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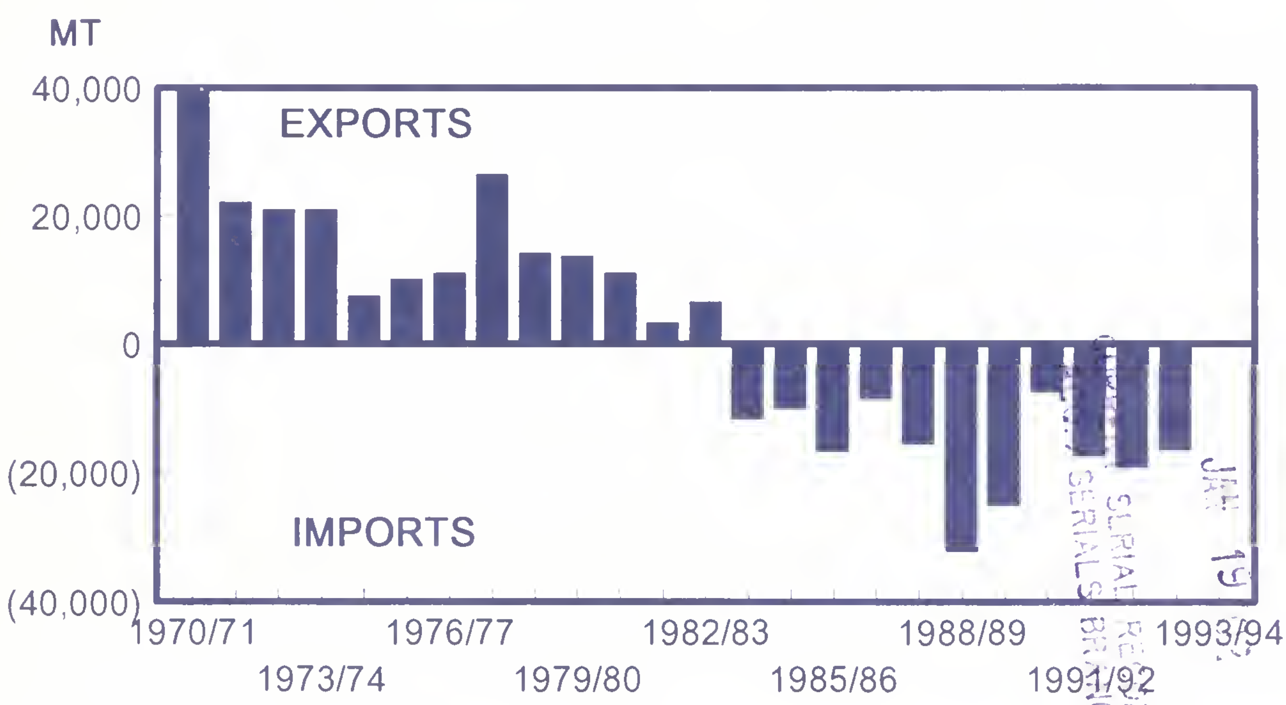
World Horticultural Trade & U.S. Export Opportunities

EU SUBSIDIES REVERSED THE FLOW OF BILATERAL CANNED PEACH TRADE

NET U.S. EXPORTS TO EU & U.S. IMPORTS FROM EU
197O/71-1993/94 (JUN/MAY); METRIC TONS



Source: U.S. Census data

U.S. net trade in canned peaches with the European Union (EU) has changed dramatically over the past quarter century. This reversal, from net exporter to net importer, was facilitated by provisions in the EU's Common Agricultural Policy that encouraged the meteoric rise of Greece's peach industry. Through generous CAP programs, the EU has become the dominant supplier to the United States and has displaced U.S. exports in many important third-country growth markets. **(For details on the Canned Deciduous Fruit situation, see page 23)**

Approved by the World Agricultural Outlook Board - USDA

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ANALYSIS

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Ross Kreamer	202-720-9903	Canned deciduous fruit, wine, table grapes, kiwifruit, NAFTA, PL-480, and GSM-102 export credits
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MARKETING

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Ted Goldammer	202-720-8498	Wine, brandy, and almonds
Jean Harman	202-720-0897	Fresh and canned pears, canned peaches, fresh cherries, honey, hops, and potatoes
Stacey Peckins	202-690-1341	Nursery products, avocados, pistachios, papaya, and canned tomatoes
Elise Pinkow	202-690-1341	Table grapes, concord grapes, peaches, pears, plums, and cranberries
Steve Shnitzler	202-720-8495	Walnuts, kiwifruit, ginseng, asparagus, tart cherries, and processed corn
Robert B. Tisch	202-720-0898	Citrus, raisins, and prunes

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Table of Contents

PAGE

EXPORT NEWS AND OPPORTUNITIES:

First California citrus exported to Mexico while approval of other states is pending. 6
Revenue Canada has determined that U.S. apples were dumped on the Canadian market. 6
Taiwan inspectors reviewed the Washington State apple industry 6
Venezuela has imposed a new cold storage requirement on U.S. apple and pear imports 6
GSM-102 credit guarantee program allocations announced for FY 1995 7

WORLD TRADE SITUATION AND POLICY UPDATES:

The United States has initiated a Section 301 investigation of the European Union banana import regime. 7
The ITC has imposed an anti-dumping duty on imports of Chinese garlic 8
Brazilian orange juice production and exports reduced due to smaller Sao Paulo orange harvest 8

FEATURE ARTICLES:

World Fresh Apple and Pear Update 10
Canned Deciduous Fruit Situation for Selected Countries 23
The Accession of Austria, Finland, Norway, and Sweden to the European Union: Will it Hurt or Help U.S. Export Opportunities for Fresh and Processed Fruits? 42

STATISTICS:

U.S. Horticultural Exports and Imports Summary 4
FY 1994 & FY 1995 GSM-102 Credit Guarantee Coverage 7
Apples: Supply & Utilization in Selected Countries 17
Pears: Supply & Utilization in Selected Countries 20
Greece: Exports of Canned Peaches 25
Italy: Exports of Canned Peaches 26
Japan: Imports of Canned Peaches by Country of Origin 28
Japan: Average Import Price of Canned Peaches 29
United States: Canned Fruit Mixtures Exports 35
United States: Canned Peach Exports and Imports 36
United States: Canned Pear Exports 37
U.S. Cling Peach Situation and Outlook 37
Canned Peaches: Production, Supply, and Distribution 38
Canned Pears: Production, Supply, and Distribution 39
Canned Fruit Mixtures: Production, Supply, and Distribution 40
Canned Apricots: Production, Supply, and Distribution 41
U.S. Exports and Imports (by destination and origin) 49

Export Summary

U.S. horticultural exports rose again in August 1994, to $689.0 million, 17 percent over July 1993. Ten out of 14 categories of agricultural exports registered export increases with the largest demonstrated by fresh fruit and fruit/vegetable juices. The largest increases for individual items were in shelled walnuts (up 118 percent to $3.7 million, fresh apples (up 91 percent to $29.4 million), non-concentrated orange juice (up 88 percent to $9.8 million), beer (up 83 percent to $44.0 million), and frozen strawberries (up 65 percent to $3.1 million). Total exports for FY 1994-to-date (October-August) were $7.39 billion, up 10 percent over the same time period in FY 1993.

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
AUG 94

NAME GROUP & COMMODITY	QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS MT										
GRAPEFRUIT	8,356	13,579	436,921	450,862	444,767	4,285	6,559	218,006	222,793	222,290
LEMONS	7,627	8,695	120,644	115,920	127,336	8,819	12,169	90,595	96,614	99,698
ORANGES, INCL TMPLS	37,051	28,808	540,706	506,861	562,596	20,033	15,044	265,081	271,994	279,503
OTHER CITRUS	308	270	19,062	25,951	19,313	213	228	16,317	20,011	16,507
Subtotal:----	53,344	51,354	1,117,334	1,099,595	1,154,014	33,352	34,001	590,001	611,413	618,001
FR, FRT, NON-CIT MT										
APPLES	22,877	43,982	454,607	618,676	487,808	15,415	29,402	273,925	375,981	297,141
AVOCADOS	970	1,981	13,593	7,511	14,185	903	1,979	13,573	10,027	14,223
CHERRIES SWT & TRT	384	316	25,612	30,637	25,747	862	546	111,067	130,839	111,252
GRAPES	25,667	29,903	128,976	153,695	184,774	32,388	34,797	160,746	184,378	215,189
KIWIFRUIT	33	63	8,297	8,703	8,359	59	78	11,980	13,020	12,071
MELONS	38,436	41,974	177,347	193,265	196,473	12,415	14,815	67,163	71,961	74,192
PAPAYA	522	599	7,026	7,141	7,596	972	1,105	13,083	13,514	14,151
PEACHES & NCTRNS	14,437	21,602	54,847	69,527	63,998	10,879	15,667	50,859	56,529	57,507
PEARS	7,308	10,560	88,108	123,459	98,815	4,256	5,262	54,035	67,312	60,258
PLUMS/PRUNES	15,922	26,080	47,516	59,244	56,959	13,049	20,653	44,989	48,156	52,120
STRAWBERRIES	4,988	6,954	41,123	50,627	45,415	8,555	12,421	68,828	83,651	77,412
OTHER NON-CITRUS	10,316	8,355	45,559	50,489	53,452	9,774	8,673	47,532	53,139	53,860
Subtotal:----	141,865	192,374	1,092,614	1,372,980	1,243,586	109,531	145,402	917,786	1,108,513	1,039,381
CND/PREP FRUIT MT										
CHERRIES TRT CND	361	440	6,661	5,065	7,322	581	676	11,485	9,148	12,632
FRUIT MIXTURES	3,187	1,814	32,321	24,445	35,007	3,798	2,061	36,372	28,421	39,597
MARACHINO CHRY	455	339	4,135	4,173	4,912	944	713	8,177	7,970	9,706
PEACHES CANNED	1,368	1,184	19,450	16,773	21,390	1,271	1,148	19,009	16,427	20,960
PINEAPPLE CANNED	383	518	4,012	3,754	4,295	356	417	3,673	3,313	3,931
FRT PREP/PRES	4,860	6,248	56,168	58,678	61,466	6,075	7,321	68,999	67,277	75,437
OTHER CANNED FR	2,941	2,727	29,888	40,427	32,246	2,753	2,865	28,443	34,821	30,629
Subtotal:----	13,557	13,273	152,637	153,317	166,641	15,782	15,203	176,160	167,381	192,895
DRIED FRUIT MT										
PRUNES, DRIED	6,668	4,743	78,941	52,766	84,752	13,878	11,438	125,340	125,322	137,529
RAISINS, DRIED	13,363	12,522	108,627	111,361	121,529	21,647	20,611	160,220	177,080	180,885
OTHER DRIED FRUIT	1,497	1,868	17,932	18,954	19,865	3,695	4,795	43,570	46,416	49,237
Subtotal:----	21,529	19,134	205,500	183,082	226,148	39,220	36,845	329,132	348,819	367,651
FROZEN FRUIT MT										
BLUEBERRIES, FZN	701	1,115	7,929	6,608	8,600	1,027	1,422	13,998	9,919	15,058
STRAWBERRIES, FZN	2,571	4,300	13,604	22,463	16,017	3,124	5,154	17,588	28,814	20,864
OTHER FZN FRUIT	2,019	1,655	14,798	12,978	16,231	2,779	2,508	21,472	20,038	23,726
Subtotal:----	5,292	7,070	36,332	42,049	40,849	6,932	9,085	53,059	58,772	59,649
FRT&VEG JUICE (SSE) KL										
GRAPEFRUIT JU CNC	3,515	2,875	57,551	35,203	60,686	1,982	2,872	35,073	31,179	36,980
ORANGE JU NT CNC	7,006	14,965	84,714	118,569	92,328	5,203	9,841	63,603	79,015	68,746
ORANGE JUICE CNC	38,604	33,485	325,230	257,574	349,883	15,610	15,420	130,550	141,975	140,737
OTHER JUICES	29,435	34,940	332,094	319,220	363,216	18,069	22,440	196,092	217,719	214,146
Subtotal:----	78,561	86,267	799,590	730,567	866,115	40,865	50,575	425,319	469,891	460,611
VEGETABLES FR MT										
ASPARAGUS, FR, CHLD	403	512	21,067	21,727	21,288	1,864	2,809	61,582	70,321	62,514
BROCCOLI	5,085	7,024	98,709	122,185	102,948	3,507	4,984	66,277	74,818	69,469
CAULIFLOWER	4,059	5,184	66,468	88,065	70,346	2,478	3,414	47,030	57,249	49,628
CELERY	3,366	4,675	111,587	113,584	115,257	1,133	1,866	49,650	36,370	51,058
LETTUCE, FR, CH.	15,314	18,292	294,880	292,033	315,002	6,895	8,618	144,580	117,183	154,873
ONIONS, FR	28,850	24,640	162,799	158,735	183,005	9,475	7,406	64,913	60,017	71,840
PEPPERS	2,599	2,307	58,354	50,786	60,961	2,076	1,902	46,658	43,492	48,485
TOMATOES, FR, CH.	12,861	12,195	154,990	136,377	167,332	8,128	8,478	125,543	107,060	133,834
OTHER VEG, FR.	39,170	41,501	607,369	651,523	638,995	20,418	21,042	336,126	341,866	355,598
Subtotal:----	111,710	116,333	1,576,227	1,635,019	1,675,138	55,979	60,524	942,364	908,379	997,304
VEGETABLES CANNED MT										
CATSUP & CHILI SA	2,345	2,770	21,580	27,554	23,641	1,867	1,935	16,865	22,118	18,526
SWEET CORN CANNED	11,887	8,664	161,737	136,110	176,881	8,992	7,056	120,414	109,687	132,161
TOMATO PASTE	9,415	9,747	63,012	69,282	73,238	8,073	8,007	51,554	57,797	59,815
TOMATO SAUCE	4,518	5,537	63,321	75,725	68,893	4,546	5,530	60,379	74,255	65,694
OTHER CANNED VEG.	20,630	21,022	210,719	188,715	229,781	24,276	22,663	256,232	228,674	278,154
Subtotal:----	48,798	47,742	520,372	497,387	572,436	47,757	45,193	505,447	492,532	554,351
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	19,251	21,095	193,467	226,912	211,387	13,445	15,321	136,912	163,695	149,434
FZN SWT CORN	4,837	4,629	56,026	55,680	62,107	4,019	3,898	45,536	49,182	50,528
OTHER POT. FZN	1,632	1,520	16,750	18,517	18,656	1,502	1,245	13,528	14,879	14,968
OTHER FZN VEG	4,706	4,951	54,931	50,495	60,509	4,643	4,567	52,058	48,485	57,313
Subtotal:----	30,428	32,196	321,175	351,606	352,660	23,611	25,033	248,036	276,242	272,244
DEHYD VEGETABLES MT										
GARLIC DEHY	839	797	6,873	7,258	7,478	1,926	1,786	16,664	17,497	18,182
ONIONS DEHY	2,182	2,293	21,053	24,563	23,183	5,005	4,975	49,271	54,933	53,986
POTATO DEHYD	2,974	3,965	30,928	38,086	34,315	3,202	4,044	31,565	39,574	35,043
OTHER DEHY VEG.	2,410	2,566	30,056	26,361	32,937	3,865	5,266	44,556	51,513	49,325
Subtotal:----	8,407	9,623	88,912	96,268	97,915	13,999	16,074	142,057	163,519	156,537
TREE NUTS MT										
ALMND SH/PREP	14,917	10,957	146,516	144,720	161,466	55,466	45,075	502,299	652,189	565,786
ALMONDS, UNSHLD	1,237	1,765	14,244	12,611	15,878	3,274	4,338	29,240	33,682	32,772
PISTACHIO, UNSHLD	635	819	12,447	9,497	12,840	2,538	2,461	41,246	27,522	42,591
WALNUTS, SHLD	538	1,006	15,937	18,834	16,909	1,693	3,685	54,341	67,620	58,735
WALNUTS, UNSHLD	347	430	30,270	41,436	33,152	760	782	61,283	79,108	67,492
OTHER NUTS	3,989	3,883	53,928	53,951	57,568	12,255	11,274	155,581	158,112	168,454
Subtotal:----	21,665	18,863	273,344	281,050	297,816	75,988	67,617	843,992	1,018,236	935,834
NURSERY PRODUCTS NONE										
CUT FLOWERS	0	0	0	0	0	3,195	3,362	34,331	34,751	38,122
OTHER NURSERY	0	0	0	0	0	10,450	9,666	162,858	144,153	172,239
Subtotal:----	0	0	0	0	0	13,645	13,028	197,190	178,905	210,362
HOPS & PRODUCTS MT										
HOP EXTRACT	163	159	3,815	5,248	4,027	2,519	2,361	64,122	60,425	66,837
HOP PELLETS	136	146	4,815	3,923	5,116	1,030	920	29,293	21,921	30,931
HOPS, NSFP	10	90	2,487	1,965	2,521	133	507	15,311	11,361	15,507
Subtotal:----	310	396	11,118	11,137	11,665	3,683	3,789	108,727	93,708	113,275
WINE KL										
GRAPE WINES	9,727	12,313	107,110	108,111	117,688	14,202	17,827	150,383	158,648	165,337
OTHER WINE PRODUCTS	1,274	1,716	13,808	12,264	14,839	997	1,606	10,232	12,607	11,242
Subtotal:----	11,002	14,030	120,919	120,375	132,527	15,199	19,433	160,616	171,255	176,580
MISCELLANEOUS KL										
BEER & BEVERAGES	37,156	74,584	379,036	543,823	414,388	23,894	44,075	237,485	342,035	259,492
EDIBLE PREPARATIONS	10,254	14,580	112,965	146,227	124,809	41,223	57,946	408,596	520,035	450,622
GINSENG	12	27	862	855	894	1,773	1,460	101,190	72,169	104,376
POTATO CHIPS	3,728	7,609	44,050	54,801	47,[illegible]4	10,187	20,301	108,549	157,297	118,430
OTHER MISC.	0	0	0	0	0	15,893	23,431	194,322	225,938	211,147
Subtotal:----	51,152	96,802	536,914	745,707	587,367	92,973	147,214	1,050,143	1,317,475	1,144,069
Grand Total:						588,523	689,022	6,690,037	7,385,047	7,298,750

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
AUG 94

NAME		QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		5,055	3,424	115,347	102,312	119,770	3,118	3,035	68,896	74,738	70,726
AVOCADO		503	650	17,587	8,318	18,470	248	568	12,520	5,687	12,899
BANANA		329,934	328,554	3,239,498	3,328,357	3,536,585	88,955	86,523	922,186	901,265	1,004,787
CANTELOUPE		16	0	213,007	224,836	213,007	4	0	67,635	67,706	67,635
GRAPE		1	34	324,833	310,317	325,134	1	20	261,539	251,450	261,626
KIWIFRUIT		2,640	2,984	22,915	27,887	24,791	2,243	1,766	14,786	16,409	16,602
MANGO		10,501	18,149	107,223	114,998	110,290	7,099	12,041	81,942	88,569	84,344
PEACH		101	98	41,277	43,038	41,376	93	81	26,338	27,755	26,410
PEAR		0	0	64,626	65,223	64,825	0	0	31,488	32,996	32,038
PINEAPPLE		11,071	10,657	114,850	116,964	124,177	4,293	3,223	42,705	38,016	46,139
STRAWBERRY		1	2	14,465	20,093	14,470	2	11	22,139	35,012	22,158
OTHER MELON		17	17	114,464	114,945	114,510	2	6	41,331	41,618	41,350
OTHER FRUIT		43,464	47,275	483,411	509,389	512,714	19,654	26,297	194,698	231,008	205,691
Subtotal:----		403,308	411,848	4,873,510	4,986,681	5,220,125	125,717	133,575	1,788,208	1,812,236	1,892,412
DRIED FRUIT	MT										
DRD APRICOT		688	653	10,360	8,376	11,053	1,658	1,133	23,427	20,721	25,135
DRD FIG & PASTE		865	579	8,079	10,218	8,786	610	1,068	10,401	12,571	10,808
OTHER DRD FRUIT		2,746	1,793	26,743	24,214	29,643	3,912	2,682	32,701	35,690	36,546
Subtotal:----		4,299	3,026	45,182	42,809	49,483	6,181	4,884	66,530	68,983	72,490
FROZEN FRUIT	MT										
FZN BLUEBERRIES		600	940	5,061	7,669	5,677	938	1,334	9,158	11,154	9,926
FZN STR		522	262	19,432	18,751	19,937	626	435	20,840	19,442	21,271
OTHER FZN FRUIT		2,878	3,498	30,084	32,278	32,037	3,248	4,213	31,902	37,517	34,039
Subtotal:----		4,001	4,701	54,579	58,699	57,651	4,813	5,983	61,901	68,113	65,236
CANNED/PREP FRUIT	MT										
CANNED OLIVES		8,399	6,915	68,370	64,838	74,492	13,383	14,219	143,286	142,180	153,316
CANNED ORANGES		3,769	4,394	39,170	47,614	41,806	3,466	3,492	37,209	37,616	39,502
CANNED PEACH		1,281	1,384	21,381	20,744	23,011	764	781	14,449	11,657	15,375
CANNED PINEAPPLE		31,634	33,998	319,336	305,882	344,866	19,138	16,948	198,364	165,883	212,896
MIXED FRUIT		3,170	1,886	31,481	34,336	33,405	2,704	1,682	28,201	28,907	29,875
PREP/PRES FRUIT		4,955	4,573	53,199	54,685	58,233	5,465	5,360	61,031	61,724	66,860
OTHER CANNED FRUIT		4,408	3,856	42,924	53,795	47,278	5,129	4,955	55,818	69,051	60,772
Subtotal:----		57,618	57,008	575,864	581,897	623,093	50,052	47,440	538,362	517,022	578,600
FRT&VEG JUICE (SSE)	KL										
APPLEPEAR JU		125,598	105,098	866,617	1,015,463	946,807	26,100	16,334	226,787	183,622	243,682
FCOJ		128,348	94,528	974,294	1,427,564	1,122,350	25,884	17,954	161,204	282,675	191,591
GRAPE JU		13,389	7,295	136,421	68,891	148,404	3,959	2,489	48,604	26,486	52,117
PINAP JU		32,016	20,535	321,120	271,223	339,270	7,221	3,789	73,742	58,984	77,767
OTHER FRUIT JU		13,343	14,412	138,524	155,480	149,384	6,488	6,840	69,544	86,449	77,630
Subtotal:----		312,696	241,870	2,436,978	2,938,623	2,706,217	69,655	47,408	579,883	638,217	642,789
FRESH VEGETABLES	MT										
GARLIC		7,235	394	23,626	30,607	29,171	3,583	368	20,623	24,299	23,144
ASPARAGUS		1,712	2,260	28,234	25,298	29,852	1,644	2,975	37,581	38,525	39,213
BELL PEPPER		3,899	3,186	117,915	119,157	121,859	5,014	5,500	123,593	138,631	129,247
CARROTS		3,217	3,674	44,325	51,923	51,431	866	1,276	12,284	13,305	14,066
CHILI PEPPER		2,533	2,779	34,174	41,298	36,933	1,598	2,356	47,295	41,291	48,709
CUCUMBER		2,951	5,638	237,695	248,202	238,841	1,453	2,631	84,350	105,347	85,192
ONIONS		6,493	5,695	208,951	248,069	218,400	4,426	3,955	100,317	132,978	104,818
POTATO, INCL SD		3,464	5,481	287,306	304,776	302,186	598	1,087	46,816	68,322	49,596
SQUASH		805	1,046	93,995	101,132	95,290	464	644	86,900	57,675	87,590
TOMATOES		15,594	21,169	365,237	391,118	380,911	8,687	18,015	296,938	319,263	307,454
OTHER FRESH VEGETAB		18,594	19,586	265,541	259,549	285,285	8,448	9,620	147,431	154,466	156,317
Subtotal:----		66,502	70,912	1,707,004	1,821,133	1,790,165	36,786	48,432	1,004,131	1,094,108	1,045,351
CANNED/DEHYD VEGET	MT										
CND ARTICHOKE		1,910	2,738	18,889	28,512	20,456	2,949	5,310	29,780	49,579	32,256
CANNED BAMBOO		1,369	2,373	25,633	26,108	28,680	1,166	1,827	22,554	20,861	24,939
CND MSHROOMS		3,271	5,748	43,910	59,905	47,213	7,061	12,567	93,792	122,010	100,977
CND PIMIENTO		507	483	5,725	5,964	6,172	560	622	8,032	7,369	8,532
CND TOM		5,141	5,342	41,423	40,878	45,500	1,884	1,979	16,258	15,213	17,799
CANNED WATERCHESTNU		5,228	2,475	36,623	38,176	39,558	3,749	1,668	25,780	26,004	27,926
TOMATO PASTE & SAUC		2,045	1,705	38,972	58,649	40,209	1,237	1,140	26,494	40,885	27,282
DRIED MUSHROOMS		131	165	1,741	1,405	1,817	1,515	1,748	21,463	15,654	22,462
DRIED TOMATOES		367	469	5,802	5,419	6,491	1,423	1,807	23,250	20,611	25,842
OTHER DEHYD VEGETAB		14,195	3,758	80,417	77,025	89,437	6,786	3,466	56,470	49,229	61,180
OTHER CND VEG		16,964	20,174	179,912	198,904	197,571	17,783	20,283	190,643	207,545	208,971
Subtotal:----		51,132	45,434	479,051	540,949	523,108	46,118	52,422	514,521	574,965	558,172
FROZEN VEGETABLES	MT										
BROCCOLI FZN		7,904	9,078	160,989	119,634	170,431	5,193	6,101	107,193	80,527	113,224
CAULIFLOWER FZN		923	1,273	20,533	27,242	22,290	673	920	14,586	22,945	15,842
POTATO FZN		8,997	9,793	116,247	119,848	125,895	5,023	5,335	63,835	66,298	69,284
OTHER VEG FZN		205,071	353,242	1,529,295	2,272,031	1,671,650	6,722	8,098	82,278	96,927	88,516
Subtotal:----		222,897	373,387	1,827,065	2,538,756	1,990,268	17,611	20,456	267,893	266,698	286,869
TREE NUTS	MT										
BRAZILS TOT		1,546	1,191	9,931	11,035	10,429	2,351	2,215	14,221	18,308	15,171
CASHEWS TOT		5,154	6,626	58,189	59,724	64,377	21,169	29,952	235,364	260,124	260,328
COCONUT		5,971	5,146	53,512	61,882	59,768	5,025	4,586	44,115	51,014	49,330
PECANS		926	271	19,603	12,663	20,305	6,805	1,106	85,820	30,617	88,874
OTHER NUTS		1,298	1,415	19,301	15,975	21,106	5,011	5,801	66,186	58,437	73,209
Subtotal:----		14,898	14,652	160,539	161,281	175,987	40,363	43,661	445,709	418,502	486,914
NURSERY PRODUCTS	M										
CARNATIONS		47,677	60,093	859,453	995,920	920,969	4,750	4,541	76,800	84,207	82,772
CHRISTMAS TREES		0	0	1,995	2,029	1,995	0	0	17,286	17,116	17,286
CHRYSANTHEMUMS		14,056	40,970	143,830	515,463	159,073	5,574	3,901	61,884	61,925	66,054
ROSES		33,804	38,507	544,354	629,486	584,669	5,266	6,439	96,665	115,895	102,915
TULIP BULBS		109,326	121,882	188,284	200,364	284,022	12,505	13,216	21,436	22,044	32,959
OTHER CUT FLRS		0	0	0	0	0	7,417	8,906	97,801	112,828	106,414
OTH NURS PROD		0	0	0	0	0	23,784	24,244	190,482	199,175	215,556
Subtotal:----		204,864	261,452	1,737,917	2,343,263	1,950,730	59,297	61,249	562,359	613,194	623,959
HOPS & PRODUCTS	MT										
HOPS & PELLETS		1	1	3,981	5,251	3,982	11	11	22,226	32,960	22,237
OTHER HOP PRODS		1	0	134	703	134	11	0	933	4,251	933
Subtotal:----		2	1	4,116	5,954	4,116	22	11	23,159	37,211	23,171
WINE	KL										
RED WINE		7,572	10,033	91,207	105,396	98,370	23,758	32,544	353,772	358,529	379,584
SPARKLING WINE		2,321	2,573	26,761	27,615	29,680	17,556	23,867	222,546	240,789	251,670
WHITE WINE		8,295	8,917	85,194	93,094	92,358	21,487	24,536	258,912	272,866	279,901
OTHER WN PROD		2,594	2,384	21,694	26,084	23,752	6,577	5,991	54,984	67,057	60,012
Subtotal:----		20,784	23,908	224,857	252,190	244,162	69,379	86,939	890,216	939,243	971,169
MISCELLANEOUS	KL										
BEER & BEVERAGES		106,426	128,297	1,015,665	1,208,697	1,119,446	90,138	104,857	863,711	987,910	952,084
OTHER MISC.		0	0	0	0	0	60,893	63,804	658,818	703,904	720,413
Subtotal:----		106,426	128,297	1,015,665	1,208,697	1,119,446	151,031	168,661	1,522,529	1,691,815	1,672,498
Grand Total:							677,031	721,127	8,265,407	8,740,313	8,919,637

Export News and Opportunities

First California citrus exported to Mexico while approval of other states is pending.

The California citrus industry has begun exporting citrus to Mexico, following the recent decision by Mexico's government to lift its phytosanitary-based restrictions and allow imports from that state. According to industry sources, the initial shipments have been relatively small and have been comprised primarily of high quality lemons, and some Valencia oranges. Given the marketing patterns for Mexico's own domestic production, the spring and early summer are considered to offer the best window of opportunity for California oranges. One citrus industry source has estimated that sales to Mexico could reach $5 million in the first full marketing season and eventually grow to $30 million annually within the next few years. The bilateral technical review and exchange process for gaining export approval for other citrus-producing states (i.e., Arizona, Texas, Florida), meanwhile, is ongoing.

Revenue Canada has determined that U.S. apples were dumped on the Canadian market.

In response to a complaint filed by the Canadian Horticultural Council, Revenue Canada announced on October 12 a preliminary determination of dumping of imports of U.S. Delicious apples. The average margin of dumping was calculated to be 22 percent. As part of the ruling, normal values were established for Red and Golden Delicious apples ranging between US$12.96 and US$13.50, depending on the variety and type of storage (i.e., cold versus. controlled atmosphere). If U.S. F.O.B. export prices to Canada fall below these estimated normal values, Revenue Canada will collect the difference as a duty. On January 10, 1995, Revenue Canada will make a final decision on whether to uphold the finding of dumping or terminate the investigation. Canada is a key market for U.S. apples, with the Red Delicious and Golden Delicious varieties accounting for the bulk of the trade. U.S. apple shipments to Canada in marketing year 1993/94 were valued at $60 million, representing about 16 percent of total exports in that year, making Canada the United States' third-largest export market. Canada ruled five years ago that the United States had dumped Red and Golden Delicious apples into its domestic market, and beginning November 20, 1991, anti-dumping duties were assessed on shipments of these two varieties. However, on February 7, 1994, the Canadian International Trade Tribunal (CITT) rescinded the 1991 ruling and the minimum import prices assessed against U.S. apples exported to Canada.

Taiwan inspectors reviewed the Washington State apple industry.

Two quarantine officials from Taiwan visited Washington State October 10 - 16 to tour apple orchards and packing facilities. This was the third such visit for Taiwanese inspectors within approximately the last two years. They were accompanied on the inspection tour by officials from APHIS and the industry. The purpose of the trip was to observe production, packing, and inspection procedures employed by Washington's apple industry for codling moth control. Though the inspection occurred in Washington State, the findings and recommendations will apply to other states as well. Taiwan is the United States' largest off-shore market for apples with sales reaching $75 million during MY1993/94, second only to Mexico.

Venezuela has imposed a new cold storage requirement on U.S. apple and pear imports.

Venezuela implemented a new cold storage requirement for U.S. apples and pears. Specifically, fruit must be treated for a period of 12 days at 0 degrees centigrade or for 16 days at 0.5 degrees centigrade. Such treatment may be applied in transit, but a temperature recording (ryan type recording is permissible) must be presented to Venezuelan quarantine authorities upon its arrival. Venezuelan plant quarantine officials have stated the cold treatment requirement was put into place last year following an importation of apples from Colombia that was infested with codling moth. However, Venezuela imported more than 2,000 MT of apples from the U.S. in 1994 before the cold storage requirement was announced. The United States shipped $1.7 million of apples to Venezuela in 1993.

The GSM-102 credit guarantee program allocations announced for FY 1995.

A total of $12.5 million in GSM-102 coverage for horticultural products has thus far been allocated for FY 1995. New items include fresh fruit and nuts to Colombia. Table 2 shows the various horticultural allocations by country and commodity as of October 21. A preliminary assessment of business under the program last year (FY 1994) is presented in Table 1. A total of $6.6 million in export applications were approved for fiscal 1994, all of it for hops and fresh fruit to Mexico.

TABLE 1: FY 1994 GSM-102
Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 ($1,000)	Exporter Applications Approved ($1,000)	Balance ($1,000)
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Almonds	1,000	0	1,000
Fresh fruits 2/	3,000	3,000	0
Hops	7,500	3,600	3,900
Russia			
Almonds	1,000	0	1,000
Fresh Fruits 4/	500	0	00
Vegetables 5/	1,000	0	1,000
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Venezuela			
Fresh Fruits 6/	2,000	0	2,000

1/ Coverage through September 30, 1994.
2/ Apples, pears, plums, peaches, nectarines, and strawberries.
3/ Cut and frozen for french fries.
4/ Apples, oranges, tangerines, lemons, and pears.
5/ Canned or frozen. 6/ Apples, pears, plums, grapes, cherries, and peaches.

TABLE 2: FY 1995 GSM-102
Credit Guarantee Coverage 1/

Country/ Commodity	Announced Allocations FY 1994 ($1,000)	Exporter Applications Approved ($1,000)	Balance ($1,000)
Indonesia			
Potatoes 3/	2,000	0	2,000
Mexico			
Fresh fruits 2/	1,000	0	1,000
Hops	5,000	0	5,000
Russia			
Almonds	1,000	0	1,000
Fresh Fruits 4/	500	0	00
Vegetables 5/	1,000	0	1,000
Tunisia			
Almonds/Walnuts	500	0	500
Raisins	500	0	500
Colombia			
Fresh Fruit	500	0	500
Tree Nuts 6/	500	0	500

1/ Coverage through October 21, 1994.
2/ Apples, pears, plums, peaches, nectarines, and strawberries.
3/ Cut and frozen for french fries.
4/ Apples, oranges, tangerines, lemons, and pears.
5/ Canned or frozen.
6/ Almonds, walnuts, pistachios, pecans, and hazelnuts.

World Trade Situation and Policy Updates

The United States has initiated a Section 301 investigation of the European Union banana import regime.

On October 17, 1994, the United States Trade Representative initiated an investigation, under Section 301 of the 1974 Trade Act, as amended, of the European Union practices discriminate against U.S. banana marketing and distribution companies. Section 301 provides the means for businesses and individuals in the United States to seek the aid of the government in gaining relief from unfair trade practices which burden or restrict U.S. commerce.

On September 2, 1994, Chiquita Brands International, Inc. and the Hawaii Banana Industry Association filed a petition under section 301 of the Trade Act of 1974. The petition alleged that the policies and practices of the European Union (EU), Colombia, Costa Rica, Nicaragua and Venezuela, concerning trade in bananas, are discriminatory, unreasonable and burden or restrict United States commerce. In particular, the petition alleged that the following acts, policies and practices are discriminatory and unreasonable: (1) Council Regulation (EEC) No. 404/93 and related rules implementing a Community banana policy discriminating against U.S. banana marketing companies importing bananas from Latin America, including a restrictive and discriminatory licensing scheme designed to transfer market share to firms traditionally trading bananas from African, Caribbean and Pacific (ACP) sources and from EU overseas territories and dependencies; and (2) the March 29, 1994 Framework Agreement on Bananas between the EU and Colombia, Costa Rica, Nicaragua and Venezuela.

In July 1993, the European Union (EU) instituted an EU-wide banana regime to replace the discriminatory regimes many EU member countries had maintained in favor of banana imports from their former colonies in Africa and the Caribbean.

Subsequently, five Latin American banana exporting countries brought and won a GATT dispute settlement proceeding which found that the EU banana import regime was discriminatory and GATT-illegal. The five had previously successfully challenged the national banana regimes of certain EU members. However, the EU blocked adoption of both panel reports.

During the spring of 1994, the EU, Colombia, Costa Rica, Nicaragua and Venezuela signed a "Framework Agreement on Bananas", in which the latter four governments settled their GATT cases against the EU in exchange for modifications in the EU banana import regime. Some of the modifications agreed upon, however, permit the four Latin governments to impose, in a discriminatory manner, export quotas and licensing provisions of the July 1993 EU-wide regime, which the petitioners allege are discriminatory and designed to maintain market share for certain European firms.

Since the Framework Agreement has not yet been implemented, the U.S. Trade Representative decided not to grant the petitioners' request to initiate section 301 investigations of the practices of the four Latin American signatories to the Agreement. However, the U.S. Trade Representative has called upon these governments to withdraw from the Framework Agreement before its implementation and seek reform of the EU's banana policy. If any of these governments implements the Framework Agreement or takes alternative steps that appear to be unreasonable, unjustifiable or discriminatory against U.S. companies, the Trade Representative will expeditiously initiate an investigation of the practices concerned.

The ITC has imposed an anti-dumping duty on imports of Chinese garlic.

On October 26, 1994, the International Trade Commission confirmed that a 376.67 percent anti-dumping duty margin will be levied on imports of garlic from China. The Commission found that Chinese garlic was being sold at less than fair value and was causing material injury to U.S. garlic growers. U.S. importers say the size of the duty amounts to a complete embargo on Chinese garlic.

Brazilian orange juice production and exports reduced due to smaller Sao Paulo orange harvest.

The longest drought in the state of Sao Paulo in over 30 years has adversely affected the orange harvest. Some regions, such as in Bebedouro, the largest orange growing area in Sao Paulo, had not received rains for about 150 days. Orange trees have generally been under severe stress from the drought, but the situation varies across the state from grove to grove. Fruit has sized poorly, the fruit drop has increased, and trees have shed leaves. Factor's which will influence the severity of the drought's effects on orange trees include fertility and type of soil, root system development, variety, and root stock. Rains returned toward the end of October.

The USDA is forecasting the 1994 Sao Paulo orange crop at 270 to 282 million 40.8 kilo boxes - - 6 to 10 percent below the previous forecast.

The dry weather adversely affected the August bloom. A heavy bloom is expected if rains return to normal. However, due to the expected late bloom, next year's harvest (Brazilian marketing year 1995/96) will likely be delayed 30 days or more.

Starting from the mid-point of the USDA production forecasts, Sao Paulo's oranges for processing in MY 1994/95 are forecast at 230 million boxes, 15 million less than the previous forecast. Fresh consumption of oranges is forecast at 44 million boxes 17 percent below the previous forecast. The dry weather has significantly reduced the quality of oranges for fresh consumption. Also, increased competition from processors for the smaller orange crop will affect fresh consumption.

Brazil's total orange juice production forecast for MY 1994/95 has been reduced from 1.12 million tons to 1.07 million tons based on the expected lower output in Sao Paulo. However, brix levels are forecast at a record due to the dry weather conditions. As of mid-October, about 70 percent of the Sao Paulo orange crop had been processed.

Brazil's MY 1994/95 orange juice export forecast has been reduced from 1.09 to 1.06 million tons based on the expected smaller orange juice output. Ending stocks are also expected to be lower than earlier forecast.

Brazil's orange juice estimates for MY 1993/94 were revised from last reported based on information from the Agricultural Affairs office in Sao Paulo

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ 1/

	1992	1993	1994
Oranges, Sao Paulo	**Million Boxes 2/**		
Production 3/	314	302	270-282
Fresh Consumption	38	51	44
Fresh Exports	2	2	2
Processed	274	249	230
FCOJ, Brazil	**1,000 Metric Tons, 65 Degrees Brix 4/**		
Beginning Stocks	68	105	100
Production			
Sao Paulo	1,100	1,060	1,030
Other States	45	53	40
Total	1,145	1,113	1,070
Exports 5/			
Sao Paulo	1,045	1,047	1,020
Other States	45	53	40
Total	1,090	1,100	1,060
Consumption	18	18	20
Ending Stocks	105	100	90
FCOJ Yields (kg/box)	4.01	4.26	4.48

1/ Harvesting and processing usually begin in late April or early May. Marketing season for FCOJ begins on July 1 of year indicated.
2/ 40.8 kilograms or 90 pounds.
3/ Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines used for processing.
4/ One metric ton at 65 degrees Brix equals 344.8 gallons at 42 degrees Brix, or 1,405.88 gallons at single strength equivalent.
5/ Includes tangerine juice.

WORLD FRESH APPLE AND PEAR UPDATE

In marketing year 1994/95, Northern Hemisphere apple production is forecast at 32.3 million metric tons, about equal to last year. Despite consistent growth in aggregate world production of apples in recent years, U.S. exports of apples in 1994/95 are forecast at a record 615,000 tons attributed to growing disposable incomes in markets of Latin America and Asia, coupled with the opening of new markets in Japan and China. The most explosive export market in recent years has been Mexico, which grew to an $87 million market in 1993/94, surpassing Taiwan as the largest market. For pears, Northern Hemisphere production in 1994/95 is forecast at 4.6 million tons, about 7 percent above last year's crop. Despite a forecast for increases in aggregate world production, another record U.S. pear crop, coupled with growth in the markets of Mexico, Asia, and the Gulf States, promises another U.S. record pear export season in 1994/95. The strong export performance in 1993/94, 128,000 tons, exceeded the 1992/93 level by 45 percent, a reflection of the large U.S. pear crop, low prices relative to those in past years, and reduced competition from cheap European deciduous fruit versus 1992/93.

APPLES

NORTHERN HEMISPHERE

In marketing year 1994/95, Northern Hemisphere apple production is forecast at 32.3 million tons, about equal to last year. Increased production in the United States, Germany, and China offset decreased production in Eastern Europe. Production in the EU in 1994/95 is forecast slightly higher from the previous year.

Since the March 1994 report, Poland, Romania, and Serbia/Montenegro have been added to the apple production table. Their inclusion provides a more complete picture of world production. Eastern Europe production, though declining in recent years because of economic difficulties, is bound to recover as their economies strengthen. Despite the forecast for poor harvests in 1994/95, total Eastern Europe apple production is still forecast at 2.6 million tons, almost 30 percent of what the EU is forecast to produce. Poland, with estimated apple production of 1.3 million tons in 1994/95, ranks 7th among selected world producers after Turkey.

In 1994/95, the United States and the EU will continue to be the world's leaders in apple trade, accounting for about 80 percent of total Northern Hemisphere exports. In 1993/94 U.S. exports of apples exceeded French exports for the first time.

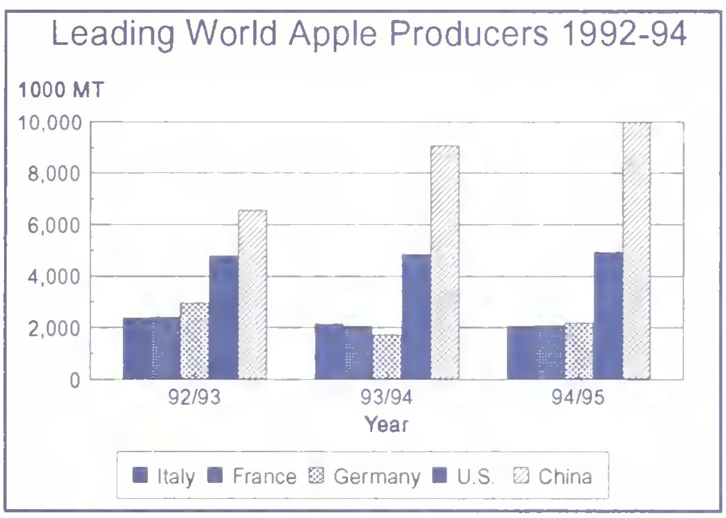
On the import side, in 1994/95, apple imports by the EU (including intra-EU trade), will comprise about 70 percent of world imports by selected countries, and are forecast at 1.8 million tons, about the same as the year before. The largest increase in imports is forecast by Japan, Austria, and Poland in 1994/95.

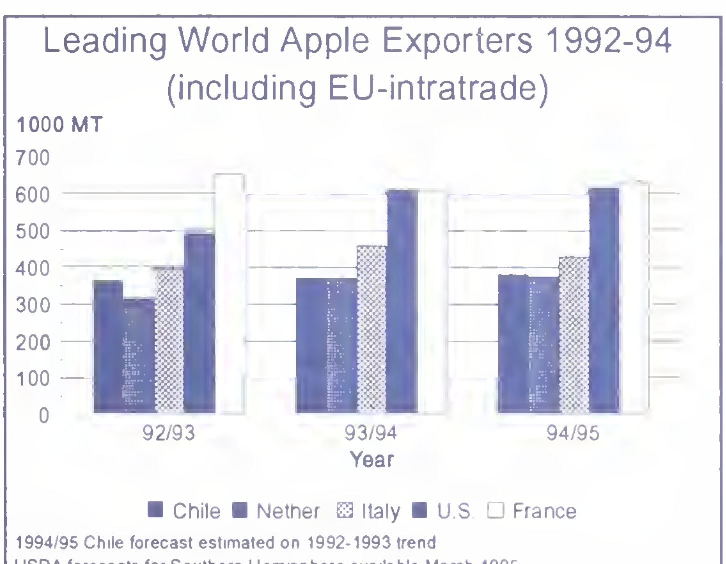
United States

The U.S. apple crop production in 1994 was a record 4.93 million tons, about 1 percent above last year's harvest and surpassing the previous record crop of 1987. Production increased by 8 percent in western states overall with a 10 percent Washington State increase more than offsetting declines in the central and eastern states. The 1993/94 production estimate was also revised

upwards by 1 percent to 4.86 million tons.

In 1993/94, U.S. apple exports set a new record value of $371 million. The most explosive export market in recent years has been Mexico, which has grown from a $6 million market in 1990/91 to an $87 million market in 1993/94, surpassing Taiwan as the largest market. Long-term export potential is also forecast for the newly opened markets of China, Japan, and Vietnam. For China, significant apple export levels are already established via Hong Kong, where a significant share of Hong Kong's apple shipments are transhipped to mainland China. During June 1994, China lifted a phytosanitary ban on the entry of U.S. apples. Future growth of direct exports to China will be dependent on further reductions in tariff levels and increased access. Other expanding markets include Indonesia, Thailand, and the Russian Far East.





<u>Canada</u>

Canadian apple output in 1994/95 is forecast at 500,000 tons, a 10 percent increase from last year's poor outturn as the result of poor weather conditions across Canada. The mid-term outlook (3 to 5 years) is for increased production given ideal weather conditions.

Imports of apples by Canada will be little changed in 1994/95, with the U.S. market share remaining about 80 percent. Canada is a key market for U.S. apples, with the Red Delicious and Golden Delicious varieties accounting for the bulk of the trade. U.S. apple shipments to Canada in marketing year 1993/94 were valued at $60 million, representing about 16 percent of total exports in that year, making Canada the United States' third-largest export market.

The stagnant Canadian import level reflects the high retail prices resulting from Canada's anti-dumping action on imports of U.S. Delicious apples, which set a floor on U.S. apple prices between 1989 and early 1994. On October 12, 1994, in response to a complaint filed by the Canadian Horticultural Council, Revenue Canada announced a preliminary determination of dumping of imports of U.S. Delicious apples. The average margin of dumping was calculated to be 22 percent. As part of ruling, normal values were established for Red and Golden Delicious apples ranging between US$12.96 and US$13.50 per box, depending on the variety and type of storage (i.e., cold vs. controlled atmosphere). If U.S. F.O.B. export prices to Canada fall below these estimated normal values, Revenue Canada will collect the difference as a duty. On January 10, 1995, Revenue Canada will make a final decision on whether to uphold the finding of dumping or terminate the investigation. Canada ruled five years ago that the United States had dumped Red and Golden Delicious apples into its domestic market, and beginning November 20, 1991, anti-dumping duties were assessed on shipments of these two varieties. However, on February 7, 1994, the Canadian International Trade Tribunal (CITT) rescinded the 1991 ruling and the minimum import prices assessed against U.S. apples exported to Canada.

For other suppliers to Canada, such as South Africa and New Zealand, there was a moderate

increase in imports following the government's decision to lift economic sanctions. In 1994/95, Canadian apple exports are forecast to increase to 65,000 tons, 30 percent over the previous season, reflecting increased supplies and a boost from the devaluation of the Canadian dollar.

Mexico

Production in 1994/95 is forecast to increase 6 percent to 530,000 tons because of the alternate year production cycle. For the next 5 years, production is unlikely to expand significantly unless government incentives are offered to producers to offset the fruit industry's stress from shortages of credit, high interest rates, increases from input costs, low domestic prices, and competition from imports. Nonetheless, excellent prospects continue for U.S. exports to Mexico because of increasing disposable income and the availability of year-round fruit resulting from increased access for U.S. fruit. Increases in U.S. exports can be attributed to the lower tariffs resulting from implementation of the North American Free Trade Agreement (NAFTA). Chile and New Zealand are also shipping apples into Mexico, and Chile's access is likely to increase. The Mexico-Chile Free Trade Agreement, which went into effect in 1991, will eventually give Chile lower tariff levels than the 20 percent now being charged.

China

Estimates for Chinese apple production in 1994/95 have been revised since the March 1994 issue of *The World Horticultural Trade & U.S. Export Opportunities*. The revised 1994/95 forecast for Chinese apple production is 10.0 million tons, a 10 percent increase from the year before due to increased harvested area and good weather. Production in 1993/94 was also revised upwards to 9.1 million tons, a 38 percent increase from March's estimate.

Chinese apple imports in 1994/95 are forecast to be minimal, while exports are forecast at 130,000 tons, 9 percent above the previous year's shipments.

Japan

Japan's apple production in 1994/95 is forecast at 1.0 million tons, a slight increase from last year as the result of favorable weather. The long term trend is for gradual decreases in production due to labor shortages and an aging farm population. The recent drop in acreage reflects a trend to remove old trees and replant new varieties such as Fuji, Jonagold, and Tsugaru that command notoriously high prices in the domestic market. These 3 varieties are forecast to contribute 75 percent of total production during 1994/95. In terms of apple trade, Japan's self-sufficiency in apple production will limit imports to about 1 percent of total supply during 1994/95. However, inroads into the Japanese market are being made. After 23 years of negotiations, Japanese officials lifted the phytosanitary ban on the importation of U.S. apples in 1994. Industry sources forecast that about 14,000 tons of U.S. apples will be imported by Japan this season. New Zealand is the other country that successfully negotiated opening the Japanese market in 1994. Imports were projected to be 1,000 tons, but only 231 tons were actually traded including Gala, Braeburn, Granny Smith, and Red Delicious.

Taiwan

Taiwan's apple production has been declining in the last 10 years as the result of liberalized imports of U.S. apples and reduced production in a costly, subsidized industry. The forecast for apple production in 1994/95 is 7,000 tons, a 14 percent decline from 1993/94; further yield revisions are likely given the impact of 5 typhoons between July and September 1994. Apple production estimates in 1993/94 were reduced by the Provincial Department of Agriculture and Forestry (PDAF) due to a production survey done which better represented current production levels. Taiwan remains exclusively an apple importer with about 93 percent of supplies provided from abroad, primarily from the United States. Currently, there is a quota and a country restriction on the volume and countries that can export to Taiwan; however, negotiations are underway to liberalize trade on apples and other fruit as part of the terms for Taiwan's entry into the GATT.

European Union

In 1994/95, apple production is forecast at 8.9 million tons, a slight increase from last year but 17 percent below the record output in 1992/93. Because of apple over-production and costly withdrawal, the EU has an uprooting program in place where producers receive payment to remove trees from production, with new plantings

prohibited for the next 15 years. The major apple producers are Germany, France, and Italy. German apple production in 1994/95 is projected at 2.2 million tons, 26 percent increase over last year. No significant trade changes are forecast in 1994/95. The drastic decline in 1993/94 compared with the record 1992/93 crop is attributed to alternation, where small crops typically follow large crops.

French production of apples is forecast at 2.1 million tons, slightly above last year's level. France, the largest apple exporter in the world, including EU intra-trade, will not significantly increase its exports in 1994/95 due to sufficient EU production, the destination of the vast majority of French apples. The U.K. and Germany accounted for about 50 percent of all French apple exports in 1993/94.

Other major EU producers maintained production levels from the previous years. Italian apple production in 1994/95 is forecast to decline 4 percent from last year and return to the normal production level of 1990. Cultivation of Red Delicious continues to decline in favor of other varieties such as Gala, Jonagold, Gloster, and Idared. Exports to Germany, Italy's major market, are forecast to decline slightly due to strong German production. In July 1993, Italy implemented the EU plant health regime which should result in export opportunities for 3rd country producers such as the United States. The United Kingdom, which leads the EU in the percent of apples imported--60 percent--will face a production decline of 9 percent to about 300,000 tons, a more average production level for the last 5 years. The U.K. is the second leading apple importer in the world after Germany, with France continuing to meet the lion's share of import demand, followed by South Africa, also the leading 3rd country supplier.

SOUTHERN HEMISPHERE

Forecasts for the Southern Hemisphere's 1994/95 crop will be available in the March 1995 issue of *World Horticultural Trade & U.S. Export Opportunities*. The Southern Hemisphere production estimates for the 1993/94 marketing year were revised upward by 2 percent to 3.3 million tons. Argentina accounts for most of this increase as production was revised upward to 1.1 million tons. More bearing trees came into production from the Rio Negro Valley than previously anticipated. Furthermore, the 1994 apple harvest that was not intended for harvest, because of financial problems, was finally harvested because the provincial government granted credits to producers and processing establishments. In general, apple production revisions were insignificant for the other Southern Hemisphere countries.

Chile, the second leading producer in the Southern Hemisphere, is expected to have a strong export season in 1994/95 because of a fall in stock levels, mainly in Europe. Additionally, in August 1994, the Chilean Government came to an agreement to implement a mandatory quality control system for fruit exports. This system should be in place prior to the start of the 1994/95 export season. South Africa's final figure for the 1993 crop marketed in 1994 has still not been released, but the preliminary figure, 613,800 tons, indicates an increase by about 3 percent over the 1992 crop, with exports increasing by about 6 percent after the poor year in the European markets during 1993.

The New Zealand apple crop in 1993/94, estimated at 459,600 tons, was significantly reduced by a hail storm just prior to harvest. As a result of shortages of export-grade apples, shipments declined 12 percent to 204,000 tons. Additionally, the opening of the Japanese market to New Zealand apples only yielded about 271 tons, less than the 1,000 goal that was forecast.

PEARS

Northern Hemisphere

Production in the Northern Hemisphere during 1994/95 is forecast at 4.6 million tons, a 7 percent increase over last year. The increase was fueled by crop rebounds in the EU by France and continued growth in U.S. production.

United States

The U.S. pear crop for 1994/95 is projected at 889,000 tons, a 3 percent increase over the previous year.

Exports of pears in 1994/95 are forecast at 135,000 tons, about 5 percent above last year's

export level. The increase reflects the forecast record U.S. pear crop, low prices relative to past years, and continued expansion in markets of Latin America, Asia, and the Gulf States.

The North American Free Trade Agreement (NAFTA), effective January 1, 1994, dropped the Mexican tariff on U.S. pears from 15 to 12 percent. Mexican imports of U.S. pears increased by 83 percent in the 1993/94 season accounting for a significant portion of the total increase in U.S. exports. Exports to Mexico in 1992/93 totaled 34,222 tons, increasing to 53,629 tons in 1993/94. Mexico has overtaken Canada as the leading destination for U.S. pear exports. United States exports to Canada increased by 14 percent from 34,899 to 39,645 tons in the 1993/94 season.

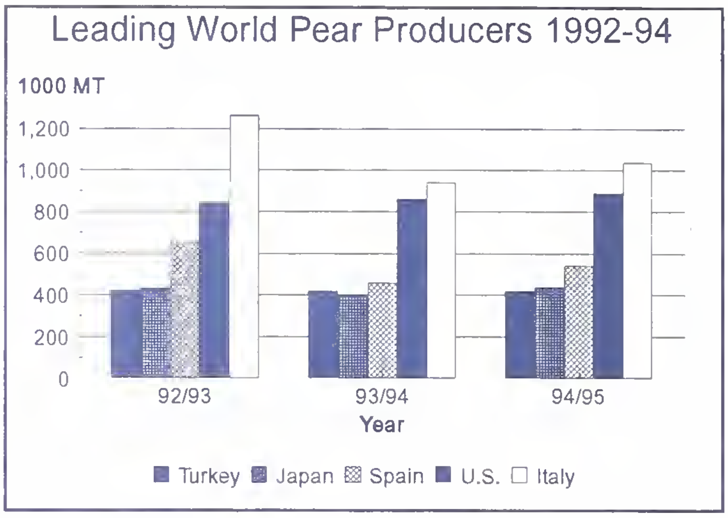
Regionally, the Gulf States in the Middle East, Saudi Arabia, United Arab Emirates, Kuwait, and, Bahrain, accounted for another significant portion of the total increase in U.S. pear exports. In 1993/94, pear exports to the Gulf States increased to 5,449 tons, a 45 percent increase over the 1992/93 level of 3,752 tons.

Countries in the European Union (EU) imported significantly more U.S. pears in 1993/94 than in the previous year, though imports of U.S. pears remained below the 1991/92 season.

The current year, 1994/95, should continue the upward expansion of U.S. pear exports to all destinations with additional recovery in European markets.

Canada

Canada's 1994/95 pear crop is forecast to rebound to 18,000 tons, 26 percent above the 1993 crop of 14,300 tons. Over the next 3 to 5 years, pear production levels will remain variable because the crop is more sensitive to weather than apples. Under ideal weather conditions in all 3 pear producing provinces, a maximum level of 24,000 tons could be reached. In terms of trade, Canadian exports of fresh pears are normally insignificant, but during 1993/94 1,900 tons was exported to Colombia. In 1994/95, export levels should return to the historical level of about 400 tons. The United States is the largest supplier of pears to Canada, and the prospects should improve because a Canadian maximum residue level (MRL) for the pesticide Amitraz in pears and apples is expected



to be established soon. The action will facilitate U.S. fresh pear exports to Canada because costly certification will no longer be required to meet Canada's zero tolerance level for the chemical.

Mexico

Mexican pear production in 1994/95 is estimated to be 31,500 tons, slightly below the 32,500 tons from last year, due to adverse weather conditions. In terms of trade, the market for imported pears has grown substantially since Mexico's import licensing scheme was eliminated in 1991. Additionally, under NAFTA, Mexico's 20 percent tariff on pear imports was cut immediately to 15 percent, with the remainder of the tariff to be phased out in 5 years. During 1994, the tariff for U.S. pears was 12 percent. Competition from Chilean pears is likely as the result of the Mexico-Chile Free Trade Agreement which went into effect in 1991. However, Chile's tariff of 20 percent has not yet been lowered and remains the same for other countries.

Italy

Italy, a leading world producer of pears among selected countries, is forecast to produce 1.0 million tons in 1994/95, an increase of 10 percent from last year. Pear production in 1994/95 is expected to return to the same level as 1990, which is considered the norm for Italy. Fresh pear exports during 1994/95 should continue at the high level of last year, 170,000 tons, because of the Lira devaluation. Import levels will also remain the same, despite the elimination of the ban on third-country Northern Hemisphere fruit.

Spain

Spain, the second-leading pear producer in the EU, is forecast to produce 543,100 tons in 1994/95, an 18 percent increase over last year as the result of favorable weather. Imports of pears are forecast to drop in 1994/95 because of ample domestic production. The major pear suppliers to Spain are Chile and Holland--during 1993/94 no U.S. pears were imported because of high prices--while pear buyers are Italy and Germany.

Germany

During 1994/95, pear production is forecast at 285,000 tons, about the same as last year. Germany, the largest pear importer in the world, is traditionally less self-sufficient in pear production than apple production, with 85 percent of supplies provided by imports. The pear crop is down from the bumper crop of 1992/93 because of alternation (i.e. the production cycle where a good crop follows a poor crop), but also because of poor weather conditions. Imports are forecast to at 200,000 tons, the same as last year.

France

French pear production this year is forecast at 336,800 tons. This is a recovery to above-average levels after last year's poor pattern, illustrating the pattern of good years following bad years. Because of increased supplies, trade will recover to normal levels and exports are forecast up 43 percent, unlike last year when France was a net importer of pears. There were significant changes in the 1993/94 import demand. Imports from Italy, Belgium, and Spain rose 62 percent and surpassed imports from the Southern Hemisphere.

Japan

Japan's pear production is forecast at 439,600 tons in 1994/95, an 11 percent increase from last year. About 97 percent of Japanese production is Nashi or Japanese sand pear. Western-style pears are a tiny but growing share of production and Japan does not export Western-style pears. For the United States, access to Japan's import market is unlikely for the foreseeable future.

Turkey

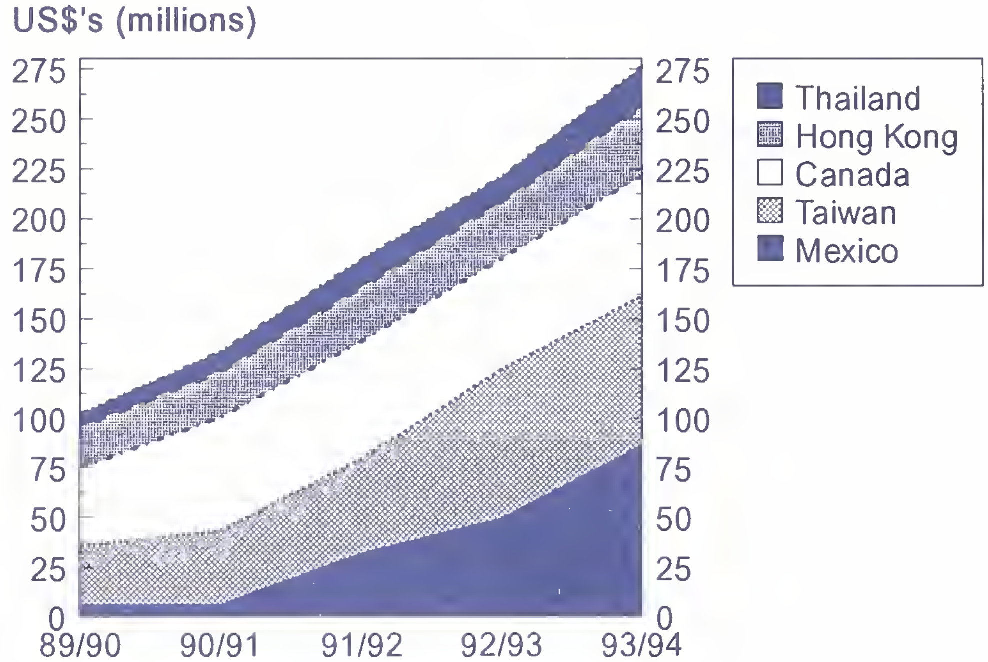
Pear production in 1994/95 is forecast at 420,000 tons, the same level as the revised 1993/94 estimate. Turkey's pear production remains in the domestic market and its exports are minimal--no imports are forecast in 1994/9 and exports are forecast at 7,000 tons. Almost all exports are destined for Saudi Arabia and Germany. Turkey is the third leading pear producer in the world, not including the EU.

SOUTHERN HEMISPHERE

Forecasts for the Southern Hemisphere's 1994/95 crop will be available in the March 1995 issue of *World Horticultural Trade & U.S. Export Opportunities*. Production estimates for 1993/94 are 1,064,000 tons of pears, 3 percent below the March 1994 forecast. South Africa's decreased crop, from 269,000 tons to 237,800 tons, accounts for the lower production estimate for the Southern Hemisphere.

In terms of trade and revisions to the March 1994 issue, Argentina registered exports of 377 tons and 300 tons during 1992/93 and 1993/94 that were previously not reported, while Chile's pear exports during 1993/94 increased from 52,000 tons to 57,000 tons, making it the 5th largest exporter among selected countries in the world (see previous chart). Finally, South Africa's exports were revised downwards from 113,000 tons to 87,000 tons because of a smaller pear crop.

U.S. Fresh Apple Exports to Top 5 Markets 1/ 1989-1994 (MY)



1/ Exports to these 5 countries in 93/94, $273 million, represent about 75% of total export value.

(For further information on supply, distribution, and trade, contact Casey Bean at 202-720-4620. For information on production, contact Kelly Strzelecki at 202-720-6791. For information on marketing, contact Jean Harman at 202-720-0897.)

Table 1
Apples: Supply & Utilization in Selected Major Producing/Trading Countries
(Metric Tons)

Country/ Mktng Yr 1/	Total Production	Commercial Production	Total Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	Withdrawals
EUROPEAN UNION (EU)								
Belgium-Luxembourg								
1992/93	492,070	488,820	107,228	599,298	145,270	255,143	98,420	100,465
1993/94	530,215	529,137	75,000	605,215	155,000	270,402	106,000	73,813
1994/95	475,425	471,900	90,000	565,425	150,000	270,340	95,085	50,000
Denmark								
1992/93	83,000	43,000	30,000	113,000	3,000	84,500	25,000	500
1993/94	85,000	45,000	25,000	110,000	3,000	80,000	26,500	500
1994/95	78,000	38,000	30,000	108,000	3,000	80,000	24,500	500
France								
1992/93	2,398,200	2,298,200	73,400	2,471,600	650,300	792,000	180,000	849,300
1993/94	2,079,000	2,043,700	107,900	2,186,900	605,500	900,000	238,900	442,500
1994/95	2,108,700	2,068,700	61,300	2,170,000	630,000	1,000,000	240,000	300,000
Germany								
1992/93	2,951,000	1,101,000	660,258	3,611,258	42,400	1,809,074	1,702,784	57,000
1993/94	1,724,000	888,000	700,000	2,424,000	66,000	1,306,000	1,002,000	50,000
1994/95	2,170,000	920,000	700,000	2,870,000	60,000	1,491,000	1,259,000	60,000
Greece								
1992/93	340,000	326,400	6,863	346,863	5,899	178,064	1,000	161,900
1993/94	300,000	288,000	5,000	305,000	5,500	193,551	1,000	104,949
1994/95	345,000	331,200	4,000	349,000	6,000	206,650	1,000	135,350
Italy								
1992/93	2,368,000	2,320,000	35,000	2,403,000	396,000	1,308,000	439,000	260,000
1993/94	2,145,000	2,105,000	38,000	2,183,000	460,000	1,109,000	509,000	105,000
1994/95	2,057,000	2,017,000	38,000	2,095,000	430,000	1,150,000	450,000	65,000
Netherlands								
1992/93	640,000	512,000	296,801	936,801	312,269	522,781	80,115	21,636
1993/94	670,000	536,000	300,000	970,000	370,000	491,000	84,000	25,000
1994/95	675,000	540,000	300,000	975,000	375,000	490,000	85,000	25,000
Spain								
1992/93	1,095,400	1,034,300	100,300	1,195,700	28,600	762,300	260,600	144,200
1993/94	874,100	839,200	102,000	976,100	20,000	710,100	200,000	46,000
1994/95	754,000	721,700	100,000	854,000	19,000	605,000	200,000	30,000
United Kingdom								
1992/93	337,000	337,000	463,117	800,117	57,290	673,497	37,070	32,260
1993/94	324,600	324,600	418,897	743,497	55,895	650,999	35,706	897
1994/95	293,800	293,800	450,000	743,800	50,305	660,377	32,318	800
SUBTOTAL -- EU								
1992/93	10,704,670	8,460,720	1,772,967	12,477,637	1,641,028	6,385,359	2,823,989	1,627,261
1993/94	8,731,915	7,598,637	1,771,797	10,503,712	1,740,895	5,711,052	2,203,106	848,659
1994/95	8,956,925	7,402,300	1,773,300	10,730,225	1,723,305	5,953,367	2,386,903	666,650
NON-EU NORTHERN HEMISPHERE COUNTRIES								
Austria								
1992/93	232,500	110,400	4,400	236,900	4,100	229,800	3,000	0
1993/94	318,200	157,200	4,100	322,300	25,800	292,500	4,000	0
1994/95	273,700	136,600	25,000	298,700	25,700	265,000	8,000	0
Bulgaria								
1992/93	221,201	176,961	15,628	236,829	2,519	57,000	160,310	17,000
1993/94	117,967	89,655	22,649	140,616	289	53,000	67,327	20,000
1994/95	110,000	82,000	20,000	130,000	1,000	50,000	60,000	19,000
Canada								
1992/93	563,954	563,954	97,475	661,429	73,996	357,433	230,000	0
1993/94	455,159	455,159	98,416	553,575	50,196	313,379	190,000	0
1994/95	500,000	500,000	100,000	600,000	65,000	325,000	210,000	0

TABLE 1 (continued)
APPLES: SUPPLY & UTILIZATION IN SELECTED MAJOR PRODUCING/TRADING COUNTRIES (METRIC TONS)

Country/ Mktng Yr 1/	Total Production	Commercial Production	Total Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	Withdrawals
China 2/								
1992/93	6,556,000	4,586,000	671	6,556,671	38,317	6,190,354	328,000	0
1993/94	9,070,000	6,350,000	1,049	9,071,049	119,418	8,497,631	454,000	0
1994/95	10,000,000	7,000,000	1,640	10,001,400	130,000	9,368,000	503,400	0
Hungary								
1992/93	666,000	340,000	0	666,000	210,000	210,000	246,000	0
1993/94	819,000	426,000	0	819,000	231,000	298,000	290,000	0
1994/95	700,000	380,000	0	700,000	210,000	210,000	280,000	0
Japan								
1992/93	1,039,000	956,600	70	1,039,070	1,520	819,550	218,000	0
1993/94	1,011,000	928,700	50	1,011,050	2,140	828,010	180,900	0
1994/95	1,048,000	965,100	14,500	1,062,500	2,300	873,200	187,000	0
Mexico								
1992/93	580,000	500,000	100,000	680,000	0	440,000	240,000	0
1993/94	500,000	430,000	160,000	660,000	0	402,000	258,000	0
1994/95	530,000	470,000	163,000	693,000	0	453,000	240,000	0
Norway								
1992/93	43,331	14,837	42,789	86,120	0	71,441	2,000	12,679
1993/94	58,559	27,390	33,335	91,894	0	71,648	9,932	10,314
1994/95	50,042	20,406	40,000	90,042	0	70,000	5,500	14,542
Poland								
1992/93	1,569,000	1,240,000	16,000	1,585,000	113,000	493,000	979,000	0
1993/94	1,842,000	1,500,000	44,000	1,886,000	176,000	560,000	1,150,000	0
1994/95	1,300,000	1,100,000	60,000	1,360,000	150,000	450,000	760,000	0
Romania								
1992/93	541,145	471,145	0	541,145	40,000	426,145	60,000	15,000
1993/94	1,097,158	972,158	7,000	1,104,158	60,000	864,158	150,000	30,000
1994/95	525,000	450,000	7,000	532,000	30,000	410,000	77,000	15,000
Russia 3/								
1992/93	1,210,000	940,000	30,000	1,240,000	0	490,000	450,000	300,000
1993/94	1,160,000	880,000	20,000	1,180,000	0	430,000	450,000	300,000
1994/95	1,100,000	830,000	20,000	1,120,000	0	407,680	426,720	285,600
Sweden								
1992/93	71,680	26,680	83,100	154,780	1,970	145,810	7,000	0
1993/94	59,560	19,560	90,000	149,560	1,530	141,030	7,000	0
1994/95	60,000	20,000	90,000	150,000	1,500	141,500	7,000	0
Taiwan								
1992/93	12,624	12,624	114,877	127,501	0	127,501	0	0
1993/94	8,128	8,128	107,544	115,672	0	115,672	0	0
1994/95	7,000	7,000	112,147	119,147	0	119,147	0	0
Turkey								
1992/93	2,100,000	2,100,000	21,365	2,121,365	45,549	1,970,816	105,000	0
1993/94	2,080,000	2,080,000	36,795	2,116,795	30,676	1,982,119	104,000	0
1994/95	2,000,000	2,000,000	40,000	2,040,000	40,000	1,900,000	100,000	0
United States 4/								
1992/93	4,798,376	4,798,376	110,401	4,908,777	489,346	2,222,998	2,196,433	0
1993/94	4,863,830	4,863,830	111,075	4,974,905	608,577	2,347,821	2,018,507	0
1994/95	4,927,198	4,927,198	112,000	5,039,198	615,000	2,305,503	2,118,695	0
Yugoslavia								
1992/93	204,000	145,000	0	204,000	0	162,000	42,000	0
1993/94	190,000	135,000	0	190,000	0	156,000	34,000	0
1994/95	195,000	138,000	0	195,000	0	161,000	34,000	0

TABLE 1 (continued)
APPLES: SUPPLY & UTILIZATION IN SELECTED MAJOR PRODUCING/TRADING COUNTRIES (METRIC TONS)

Country/ Mktng Yr 1/	Total Production	Commercial Production	Total Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	Withdrawals
SUBTOTAL: NON-EU NORTHERN HEMISPHERE COUNTRIES								
1992/93	20,408,811	16,982,577	636,776	21,045,587	1,020,317	14,413,848	5,266,743	344,679
1993/94	23,650,561	19,322,780	736,013	24,386,574	1,305,626	17,352,968	5,367,666	360,314
1994/95	23,325,940	19,026,304	805,287	24,130,987	1,270,500	17,509,030	5,017,315	334,142
SUBTOTAL: NORTHERN HEMISPHERE COUNTRIES								
1992/93	31,113,481	25,443,297	2,409,743	33,523,224	2,661,345	20,799,207	8,090,732	1,971,940
1993/94	32,382,476	26,921,417	2,507,810	34,890,286	3,046,521	23,064,020	7,570,772	1,208,973
1994/95	32,282,865	26,428,604	2,578,587	34,861,212	2,993,805	23,462,397	7,404,218	1,000,792
SOUTHERN HEMISPHERE COUNTRIES								
Argentina								
1992/93	945,000	945,000	4,335	949,335	111,273	273,062	565,000	0
1993/94	1,100,000	1,100,000	2,000	1,102,000	150,000	300,000	652,000	0
Australia								
1992/93	340,000	340,000	0	340,000	37,828	172,172	130,000	0
1993/94	321,000	321,000	0	321,000	37,000	154,000	130,000	0
Chile								
1992/93	850,000	840,000	0	850,000	361,000	85,000	404,000	0
1993/94	830,000	820,000	0	830,000	370,000	85,000	375,000	0
New Zealand								
1992/93	488,765	438,765	853	489,618	231,916	51,902	205,800	0
1993/94	459,600	399,600	384	459,984	203,500	48,080	208,404	0
South Africa								
1992/93	598,580	598,580	0	598,580	210,350	211,025	177,205	0
1993/94	613,750	613,750	0	613,750	221,830	215,845	176,075	0
SUBTOTAL: SOUTHERN HEMISPHERE COUNTRIES								
1992/93	3,222,345	3,162,345	5,188	3,227,533	952,367	793,161	1,482,005	0
1993/94	3,324,350	3,254,350	2,384	3,326,734	982,330	802,925	1,541,479	0
WORLD TOTAL								
1992/93	34,335,826	28,605,642	2,414,931	36,750,757	3,613,712	21,592,368	9,572,737	1,971,940
1993/94	35,706,826	30,175,767	2,510,194	38,217,020	4,028,851	23,866,945	9,112,251	1,208,973
1994/95	not available							

Notes:

1/ Data for Northern Hemisphere countries are for a July/June marketing year except Mexico and France which are August/July. In the Southern Hemisphere, the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February of the second year indicated, and New Zealand where the year starts in October of the first year indicated.
2/ For China, imports, exports, and utilization for 1994/95 estimated on trends from previous year and USDA forecast of this year's production.
3/ For Russia, only USDA's production figure is revised--down 60,000 tons from March 1994 estimate. To adjust 1994/95 utilization, proportional reductions were made for consumption, processed, and withdrawals.
4/ U.S. imports for 1994/95 estimated on 1992/93 to 1993/94 trend. U.S. exports for 1994/95 estimated by proportional crop increase from 1993/94 to 1994/95.

TABLE 2
PEARS: SUPPLY & UTILIZATION IN SELECTED MAJOR PRODUCING/TRADING COUNTRIES
(METRIC TONS)

Country/ Mktng Yr 1/	Total Production	Commercial Production	Total Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With-drawals
NORTHERN HEMISPHERE COUNTRIES								
European Union (EU)								
Belgium-Luxembourg								
1992/93	112,000	111,775	19,475	131,475	60,735	62,922	5,600	2,218
1993/94	147,020	146,858	15,000	162,020	80,000	67,604	7,500	6,916
1994/95	135,295	134,920	17,000	152,295	75,000	64,195	6,800	6,300
Denmark								
1992/93	8,000	6,000	8,000	16,000	200	15,750	0	50
1993/94	8,200	6,200	8,000	16,200	200	15,950	0	50
1994/95	7,800	5,800	8,500	16,300	200	16,050	0	50
France								
1992/93	393,600	384,500	74,400	468,000	99,700	300,400	30,000	37,900
1993/94	251,100	235,500	112,700	363,800	56,200	277,000	24,000	6,600
1994/95	336,800	324,800	74,700	411,500	80,000	300,000	25,000	6,500
Germany								
1992/93	578,900	50,500	193,130	772,030	4,552	495,539	271,608	331
1993/94	293,300	43,300	200,000	493,300	8,000	345,630	138,970	700
1994/95	285,000	35,000	200,000	485,000	4,000	350,000	130,670	330
Greece								
1992/93	90,000	87,300	4,166	94,166	304	78,991	12,000	2,871
1993/94	92,000	89,240	4,000	96,000	500	81,854	8,300	5,346
1994/95	95,000	92,150	3,500	98,500	500	84,100	9,000	4,900
Italy								
1992/93	1,264,000	1,184,000	81,000	1,345,000	147,000	896,000	130,000	172,000
1993/94	939,000	879,000	50,000	989,000	170,000	679,000	130,000	10,000
1994/95	1,036,000	976,000	50,000	1,086,000	170,000	796,000	110,000	10,000
Netherlands								
1992/93	115,000	92,000	85,044	200,044	98,567	95,298	5,000	1,179
1993/94	170,000	136,000	75,000	245,000	120,000	119,800	4,000	1,200
1994/95	165,000	132,000	65,000	230,000	110,000	113,800	5,000	1,200
Spain								
1992/93	652,800	618,700	24,100	676,900	34,000	589,200	34,000	19,700
1993/94	459,400	440,200	24,700	484,100	30,000	434,100	20,000	0
1994/95	543,100	518,100	15,000	558,100	35,000	497,100	26,000	0
United Kingdom								
1992/93	25,900	25,900	110,151	136,051	1,895	133,450	648	58
1993/94	43,800	43,800	91,500	135,300	2,760	130,913	876	751
1994/95	23,500	23,500	111,500	135,000	1,715	132,763	470	52
SUBTOTAL: EU								
1992/93	3,240,200	2,560,675	599,466	3,839,666	446,953	2,667,550	488,856	236,307
1993/94	2,403,820	2,020,098	580,900	2,984,720	467,660	2,151,851	333,646	31,563
1994/95	2,627,495	2,242,270	545,200	3,172,695	476,415	2,354,008	312,940	29,332
NON-EU NORTHERN HEMISPHERE COUNTRIES								
Austria								
1992/93	35,900	6,400	21,100	57,000	0	57,000	0	0
1993/94	44,000	8,900	17,000	61,000	0	61,000	0	0
1994/95	37,700	7,300	23,300	61,000	0	61,000	0	0
Canada								
1992/93	21,145	21,145	49,023	70,168	252	64,916	5,000	0
1993/94	14,344	14,344	54,352	68,696	2,192	62,004	4,500	0
1994/95	18,000	18,000	52,000	70,000	400	65,300	4,300	0

TABLE 2 (continued)
PEARS: SUPPLY & UTILIZATION IN SELECTED MAJOR PRODUCING/TRADING COUNTRIES (METRIC TONS)

Country/ Mktng Yr 1/	Total Production	Commercial Production	Total Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With-drawals
Japan								
1992/93	429,100	396,500	0	429,100	6,900	421,700	500	0
1993/94	396,300	365,200	0	396,300	7,280	388,550	470	0
1994/95	439,600	406,200	0	439,600	8,000	431,100	500	0
Mexico								
1992/93	32,000	26,000	36,000	68,000	0	65,600	2,400	0
1993/94	32,500	26,500	50,000	82,500	0	80,000	2,500	0
1994/95	31,500	26,000	52,000	83,500	0	81,500	2,000	0
Norway								
1992/93	4,805	2,917	12,398	17,203	0	15,009	460	1,734
1993/94	2,915	1,461	15,450	18,365	0	16,497	0	1,868
1994/95	3,188	1,661	14,000	17,188	0	16,000	0	1,188
Sweden								
1992/93	9,430	2,930	29,000	38,430	220	38,210	0	0
1993/94	9,860	2,860	27,900	37,760	230	37,530	0	0
1994/95	6,700	1,700	28,500	35,200	150	35,050	0	0
Turkey								
1992/93	420,000	420,000	0	420,000	6,712	392,288	21,000	0
1993/94	420,000	420,000	0	420,000	6,444	392,556	21,000	0
1994/95	420,000	420,000	0	420,000	7,000	392,000	21,000	0
United States								
1992/93	840,145	840,145	64,772	904,917	100,354	369,867	434,696	0
1993/94	861,100	848,500	65,509	926,609	128,332	402,171	396,106	0
1994/95	889,040	889,040	66,000	955,040	135,000	411,082	408,958	0
Yugoslavia								
1992/93	75,000	55,500	0	75,000	0	57,000	18,000	0
1993/94	78,000	59,000	0	78,000	0	61,000	17,000	0
1994/95	81,000	62,000	0	81,000	0	64,000	17,000	0
SUBTOTAL: NON-EU NORTHERN HEMISPHERE COUNTRIES								
1992/93	1,867,525	1,771,537	212,293	2,079,818	114,438	1,481,590	482,056	1,734
1993/94	1,859,019	1,746,765	230,211	2,089,230	144,478	1,501,308	441,576	1,868
1994/95	1,926,728	1,831,901	235,800	2,162,528	150,550	1,557,032	453,758	1,188
SUBTOTAL: NORTHERN HEMISPHERE COUNTRIES								
1992/93	5,107,725	4,332,212	811,759	5,919,484	561,391	4,149,140	970,912	238,041
1993/94	4,262,839	3,766,863	811,111	5,073,950	612,138	3,653,159	775,222	33,431
1994/95	4,554,223	4,074,171	781,000	5,335,223	626,965	3,911,040	766,698	30,520
SOUTHERN HEMISPHERE COUNTRIES								
Argentina								
1992/93	370,000	370,000	377	370,377	150,816	100,000	119,561	0
1993/94	400,000	400,000	300	400,300	170,000	110,000	120,300	0
Australia								
1992/93	171,000	171,000	0	171,000	32,000	55,000	84,000	0
1993/94	176,000	176,000	0	176,000	38,000	49,000	89,000	0
Chile								
1992/93	210,000	208,000	0	210,000	148,000	48,000	14,000	0
1993/94	232,000	230,000	0	232,000	155,000	57,000	20,000	0
New Zealand								
1992/93	18,451	11,951	691	19,142	2,812	13,703	2,627	0
1993/94	18,248	11,748	300	18,548	2,683	13,275	2,590	0

TABLE 2 (continued)
PEARS: SUPPLY & UTILIZATION IN SELECTED MAJOR PRODUCING/TRADING COUNTRIES (METRIC TONS)

Country/ Mktng Yr 1/	Total Production	Commercial Production	Total Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With-drawals
South Africa, Republic of								
1992/93	276,470	276,470	0	276,470	115,230	40,320	120,920	0
1993/94	237,825	237,825	0	237,825	87,060	44,265	106,500	0
SUBTOTAL: SOUTHERN HEMISPHERE								
1992/93	1,045,921	1,037,421	1,068	1,046,989	448,858	257,023	341,108	0
1993/94	1,064,073	1,055,573	600	1,064,673	452,743	273,540	338,390	0
WORLD TOTAL								
1992/93	6,153,646	5,369,633	812,827	6,966,473	1,010,249	4,406,163	1,312,020	238,041
1993/94	5,326,912	4,822,436	811,711	6,138,623	1,064,881	3,926,699	1,113,612	33,431
1994/95	not available							

Notes:

1/ Data for Northern Hemisphere countries are for a July/June marketing year except Mexico and France which are August/July. In the Southern Hemisphere, the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February of the second year indicated, and New Zealand where the year starts in October of the first year indicated.

2/ U.S. processing estimate for 1994/95 based on average ratio of production:processed for previous 3 years: 49%. U.S. import estimate for 1994/95 based on 1992/93 to 1993/94 trend. U.S. export estimate for 1994/95 based on production trend from 1993/94 and 1994/95.

CANNED DECIDUOUS FRUIT SITUATION FOR SELECTED COUNTRIES

World production of canned deciduous fruit in 1993/94 for both Northern and Southern Hemisphere suppliers declined and stagnant demand has dampened marketing prospects for many shippers. This situation will continue to present challenges for the United States and other exporting countries in coming years. U.S. exports of aggregate canned deciduous fruit for 1993/94 fell about 14 percent from last year's level. However, U.S. canned peach exports exhibited some strength by staying basically unchanged despite fierce competition from Greece and other EU suppliers in third-country markets. It is unclear whether reform of the EU's Common Agricultural Policy (CAP) will address the tremendous supply imbalance that is pressuring world markets. Recession in some of the EU countries and persistent economic problems in other major markets suggest that growth in demand will remain slack. These factors are likely to spill over into 1994/95, as many Northern Hemisphere countries assess market prospects for their recent fruit packs.

CANNED PEACHES

After several years of steady growth in canned peach production and trade, the industry currently appears to be more cautious. During 1993/94, the peach situation has been characterized by contracting production and rebounding exports and imports. Total canned peach output in selected countries during 1993/94 is estimated at about 678,000 tons, down 14 percent from last season and virtually unchanged from the previous report (see FHORT 5-94, May 1994). Declines in Greece, Italy, and Spain more than offset gains in Argentina. Production declines in 1993/94 have helped relieve some of the supply pressure resulting from the continued slump in consumer sales. Production in the selected countries in 1992/93 has been revised upward slightly to 826,564 tons. Total 1993/94 exports from selected suppliers are estimated at 495,700 tons, about five percent above the previous year. Sharply lower production and gains in export volume are expected to contribute to lower carry-out stocks in 1993/94.

EUROPEAN UNION (EU)

The EU continues to dominate all phases of the canned peach industry. Led by Greece, Italy, and Spain, the EU accounts for about 70 percent of total production from selected countries. EU dominance is a direct result of the Common Agricultural Policy (CAP) of the 1970's that encouraged Greece to plant peaches and establish a canning industry. This policy continues today in the form of processor aids, minimum grower prices, and a massive withdrawal scheme for surplus fruit. It remains to be seen what CAP reform will mean for the canned peach industry.

The EU is also the world's largest consumer of canned peaches, accounting for slightly more than half of total utilization in the surveyed countries. Given the EU's canning capacity, it is virtually self-reliant with respect to canned peach production. However, this is a comparatively recent phenomenon of the past 10 years. Prior to the early 1980's, the EU was an enormous net importer of canned peaches. On the export side, the EU now holds a commanding position in many third-country markets.

GREECE

Canned peaches in the EU are synonymous with Greece, where production in 1993/94 is estimated at about 288,500 tons or about 60 percent of total EU output. Greek production in 1992/93 is revised upward slightly from previous estimates to a record 372,697 tons, based on official data. Lower prices, high carry-over stocks and stagnant export demand contributed to the lower pack for 1993/94. Preliminary indications of the 1994 pack in Thessaloniki suggest the outturn for 1994/95 could be lower still, despite contradictory statements from some packers. Some of Greece's 30 canners reportedly doubt they will be able to continue operating if prices do not improve. Indeed, industry sources predict that widespread consolidation will occur in the next few years. Lower ending stocks and buying interest from Eastern Europe and South America have recently contributed to somewhat firmer prices. Buyers in Germany and the UK, two top importers, are cautiously assessing the size of the new Greek pack before entering the market.

Despite assorted problems plaguing the industry, Greek canned peach shipments in 1993/94 reached an estimated 310,000 tons, only slightly lower than last year's record. The quality of packed product is generally considered good this season. Although the pit fragment problem persists, the industry considers it to be under control as most markets are price buyers. Greece is extremely active in non-EU export markets, where it is a fierce competitor of the United States. In some markets such as Australia and Argentina, Greek canned fruit now faces anti-dumping charges and countervailing duties. Greece is also the major supplier of imported canned peaches to the NAFTA markets of the United States, Mexico, and Canada.

The Greek canned peach industry is heavily subsidized through annual EU programs, including: 1) minimum grower prices (MGP) for fruit delivered for processing, 2) processing aids to packers, and 3) a minimum withdrawal price on fresh peaches. An internal EU report points to widespread fraud and abuse of the withdrawal program and MGP system in Greece. Such abuses would tend to give Greek product an unfair price advantage in export markets. Greece is unofficially estimated to have destroyed about 500,000 tons of fresh peaches in 1994 under withdrawal provisions of the EU's CAP. This level is in excess of the total peach pack for the United States in 1994. Reform of the CAP for Vegetables and Fruits reportedly is currently under consideration. Without sweeping reforms, these abuses will continue to contribute to domestic oversupply and disruption in world markets for canned peaches.

The following table shows that Greece has doubled canned peach exports over the past five years, largely to neighboring EU countries. The table also reveals dramatic gains in shipments to Canada, Mexico, Japan, and South American markets.

Greece: Exports of Canned Peaches, 1988-1993
(Metric Tons, net weight)

MARKET	1988	1989	1990	1991	1992	1993 (Jan-Sep)
Mexico	0	231	3,639	4,033	17,961	5,544
Canada	4,865	12,811	11,676	10,989	16,675	9,235
United States	22,897	26,507	14,817	10,412	11,431	5,612
Subtotal	27,762	39,549	30,132	25,434	46,067	20,391
Argentina	0	0	771	1,805	4,296	3,123
Brazil	0	0	532	2,570	2,873	2,931
Chile	0	0	461	229	593	42
Japan	8,852	15,851	10,300	14,064	16,123	9,761
Poland	966	739	3,085	4,602	6,468	4,938
Austria	2,368	4,624	3,960	5,505	7,093	5,364
Finland	1,423	3,171	4,682	3,553	6,488	2,616
Sweden	1,934	2,315	3,821	3,831	3,660	1,618
Subtotal	15,543	26,700	27,612	36,159	47,594	30,393
Germany 1/	45,273	63,270	92,840	103,319	98,746	87,262
United Kingdom	22,778	24,692	34,083	28,226	31,471	38,703
Total EU	94,717	131,443	183,880	197,526	197,164	174,514
Others	6,835	19,227	15,573	7,668	12,857	8,010
TOTAL	144,857	216,919	257,197	266,787	303,682	233,308

Source: Eurostat data 1988-1993.
1/Exports before 1991 are to West Germany.

SPAIN

Spanish canned peach production for 1993/94 is revised upward to 105,700 tons, a 20 percent drop from the previous season's record pack. The lower outturn reflects a smaller peach crop and lower deliveries to canners. Many of Spain's canners are financially strapped from high interest rates and low returns. However, a recent move towards increased consolidation has helped to overcome the crisis. Leading firms are investing in plant modernization and expansion, and are starting to diversify product lines. In the important canning region of Murcia, the government has provided funding for a technology research center.

Spain is primarily a fresh fruit market, with only about 12 percent of the 1993 peach crop delivered to canners. Domestic consumption of canned product in 1993/94 appears flat after steadily rising over the past several years.

Spain ranks third among EU states behind Greece and Italy in terms of canned peach exports. A substantial devaluation of the Spanish peseta helped boost exports in 1992/93 and 1993/94. The export estimate for 1993/94 is revised upward to 32,500 tons, in large part due to expanded duty-free trade among EU members.

ITALY

Italian canned peach production in 1993/94 is revised downward to 55,000 tons, a decline of almost 45 percent from the year earlier period. Competition from the fresh fruit market, declining domestic consumption and competition from Greek product have contributed to this situation. Lower availabilities have helped to reduce stocks in the current climate of sluggish EU demand and flat domestic consumption. Despite changes in the fundamentals, the canned fruit sector remains in ill health. For example, some companies have either closed operations or changed to other products such as fruit juices. Agritalia, one of the largest Italian canned fruit companies, went bankrupt in 1993. Another major player reportedly is planning to transfer its canned fruit lines to South Africa.

Despite the gloom in the industry, exports in 1993/94 are estimated at 43,000 tons, a 10 percent increase over the previous year due in large part to a devaluation of the Lira. The following table shows the extent to which Italy depends on neighboring EU countries as markets for its canned peaches. Over the past six years almost 90 percent of Italy's total export volume has gone to other EU countries.

Italy: Exports of Canned Peaches, 1988-1993
(Metric Tons, net weight)

MARKET	1988	1989	1990	1991	1992	1993
Germany1/	14,790	12,146	23,281	24,764	23,112	22,900
U.K.	5,843	7,102	6,399	7,168	7,557	5,300
Total EC	23,751	25,825	38,823	44,586	39,214	38,400
U.S.	745	1,479	0	0	40	16
Saudi Arabia	1,704	896	1,332	1,985	431	N/A
Austria	395	473	854	980	1,014	N/A
Switzerland	256	232	137	189	246	N/A
Sweden	182	188	523	460	160	N/A
Others	3,968	3,645	3,437	5,170	3,263	5,884
TOTAL	31,001	29,470	42,260	49,756	42,477	44,300

Source: Eurostat data 1988-1992, Agricultural Affairs office for 1993.
1/Exports before 1991 are to West Germany.

SOUTH AFRICA

South Africa is an export-oriented supplier of canned fruit, with about 93 percent of canned peach production in 1993/94 (crop harvested late 1993 and early 1994) destined for foreign markets. The production estimate for 1993/94 is revised upward to about 65,400 tons from our last report on official government figures. South Africa's Canning Fruit Board (CFB) is now expected to continue in a limited capacity in setting producer prices for fruit, grading standards, and seasonal delivery contracts between growers and processors. This reverses an earlier decision to dismantle the CFB due to a collapse in the marketing agreement on minimum prices for fruit.

Producers are reportedly optimistic about long-term prospects for canned fruit exports in the post-sanctions environment. Recent exchange rate movements have also favored exports. Shipments in 1993/94 are revised upward to 60,000 tons. About 75 percent of South Africa's exports are usually shipped to Japan and EU markets. The anticipated implementation of the UR Agreement will spell the demise of the GEIS (General Export Incentive Scheme), which has been assisting exporters with up to 17 percent of the value of shipments. Industry observers suggest that the loss of the GEIS will be partially offset by devaluation of the Rand. A lower pack and slightly higher export demand helped shrink stocks in 1993/94 by 16 percent to 33,500 tons.

AUSTRALIA

The estimate for Australia's canned peach production for 1993/94 is revised upward to 34,000 tons, a moderate increase due to higher cannery intake and expectations of higher returns on the export market. Comparatively higher returns vis-a-vis the canning peach market meant that the bulk of peach production was delivered to the fresh market.

Exports in 1993/94 are now pegged at 14,000 tons. This level is historically very low and stems from continued tough competition, especially from subsidizing suppliers in the EU. The Australian canned peach industry remains concerned about the impact of the North American Free Trade Agreement (NAFTA) on shipments to Canada, its major export market. The Australian government continues to press for similar tariff treatment from the Canadians under the Canada-Australia Trade Agreement (CANATA), which sets forth that tariffs on Australian product entering Canada should not exceed tariffs imposed on a third country. Canada accounted for about a third of Australia's total canned peach exports in 1993.

Imports have fallen sharply over the past two years, due mainly to action taken against China and Greece under provisions of the Australian Anti-dumping Authority. The Authority concluded that imports of canned peaches from Spain and Greece had been sold at prices below the normal value in their respective markets. Countervailing duties were imposed on shipments of canned peaches from Spain and Greece, and anti-dumping duties were placed on product from Greece and China. The countervailing duties on canned peaches from Greece and Spain were calculated at A$4.38 and A$4.54 per carton (24 kilogram gross), respectively. Most imports are destined for the lower priced generic end of the market. This market has grown due to the protracted economic downturn in Australia. In future years, imports will likely be limited by several factors: 1) local production of generic labels, 2) an anticipated upturn in the Australian economy, and 3) buyer resistance to imported product because of higher cost due to CVD and Anti-dumping duties.

AUSTRALIA: Canned Peach Imports by Origin (Calendar Years; Metric Tons, net wt.)

Supplier	1990	1991	1992	1993
China	1,775	1,308	1,347	16
Greece	2,068	1,922	980	0
Italy	0	0	0	235
United States	3	2	44	0
New Zealand	0	0	0	66
Others	229	351	174	2
TOTAL	4,075	3,583	2,545	319

Source: Australia Customs data, reported by FAS/Canberra

CHILE

Adverse weather in some growing areas contributed to a lower peach output for canning and a slightly lower peach pack in 1994, estimated at 33,500 tons. Canned peaches are produced mainly for the more lucrative export market. Declining real prices, limited domestic demand, and narrowing margins have forced the industry to reorient production toward foreign markets over the past few years. Exports of canned peaches in 1993/94 are estimated to decline slightly to 22,200 tons based on slow pace of shipments.

JAPAN

The sun continues to set on Japan's canned deciduous fruit industry. Production of canned peaches in 1993/94 is revised upward to about 18,000 tons, a decline of about 25 percent from the previous year. This decline is attributed to high costs of production and attractive prices for fresh peaches in the domestic fruit market. Also, low 1993 prices for canning peaches led to a shift from canning peaches to higher-value fresh market varieties. Over the longer term, production declines are expected as the farm population ages. Japanese canned peach production accounts for about 20 percent of total annual consumption, the balance coming from imports. About 80 percent of the Japanese peach pack are white peaches.

Canned peach imports for 1993/94 are revised upward to a record 65,551 tons, as recessionary pressures have sharply increased the attractiveness of low-priced foreign product. This move toward cheaper imports has primarily benefitted product from Greece, China, and, to a lesser extent, South Africa. These suppliers now collectively account for about 75 percent of the market. The pace of imports during the first half of calendar 1994 suggests significant gains in market share by these three suppliers. The following tables show how comparatively lower-priced Greek and Chinese product have made dramatic inroads in this market.

JAPAN: Imports of Canned Peaches by Country of Origin
(Calendar Years/ Metric Tons)

Supplier	1988	1989	1990	1991	1992	1993	1994 (Jan-Jun)
South Africa	13,749	12,941	10,350	11,937	12,066	11,885	7,560
Greece	11,200	15,241	10,076	10,657	14,172	16,088	11,103
China	361	726	1,958	6,719	4,145	13,289	8,551
Chile	1,320	2,636	2,839	5,210	5,522	3,321	1,498
Australia	6,302	3,834	4,148	5,144	3,561	2,772	1,066
Korea	2,257	3,146	2,233	2,498	960	590	77
United States	11,214	8,350	5,851	7,988	6,391	7,016	3,191
Others	223	210	137	101	288	631	778
TOTAL	46,626	47,084	37,592	50,254	47,105	55,592	33,824

Source: Customs Bureau, Japan Ministry of Finance, in FAS post report JA4082

JAPAN: Average Import Price of Canned Peaches by Country of Origin 1/
(Yen/Kilogram, CIF 2/)

Origin	1989	1990	1991	1992	1993	1994 (Jan-Jun)
Greece	116	135	138	135	118	97
South Africa	129	153	148	156	131	114
United States	161	189	173	175	148	139
Australia	139	140	156	164	133	139
China	131	115	150	123	99	93
Chile	142	140	156	179	150	110

Source: Customs Bureau, Ministry of Finance, GOJ, in FAS post report JA4082
1/ Average for retail size cans, mainly 2-1/2 and 303.
2/ Average exchange rate (yen to one US dollar): 1991 = 135; 1992 = 127; 1993 = 112; 1994 (Jan-Jun) = 107.

CANNED PEARS

The canned pear situation in 1993/94 is characterized by lower production, slightly higher exports, and a rebounding of stocks. Total canned pear production in the six selected countries in 1993/94 is estimated at 175,164 tons, a decline of about 10 percent from last year. A substantial decline in Italy accounts for most of the reduction. Indeed, all reporting countries registered year-on-year declines in production. Despite lower outturn, prices were generally well below the levels of the previous year. Aggressive pricing and the lower 1993/94 pack reflect the continued competitive situation in world markets. Total exports by the selected suppliers are revised downward to about 96,400 tons. Continued sluggish demand in 1993/94 is expected to result in the highest level of stocks in four years.

EUROPEAN UNION

The EU enjoys a dominant position in the global pear industry. Collectively, the EU is both the world's largest producer and consumer of canned pears. Italy leads the EU in exports, primarily to other Community markets, especially Germany. Last year's record production combined with stagnant domestic consumption contributed to a four-fold increase in stocks. Although EU production for 1993/94 is now estimated to have fallen by 15 percent, continued sluggish demand by both EU consumers and export markets have led to still high carryover stocks of about 56,950 tons. This situation has prevented prices from recovering.

ITALY

Italy's subsidized canned pear industry is export driven. Production for 1993/94 is estimated at 59,000 tons, a decline to more usual levels following last year's exceptionally large pack. The decline is mainly due to the drop in fresh fruit production. Although the 1993 pack was lower, slack demand has kept stocks at high levels. This is in part because Italian consumers prefer fresh fruit, a situation which has contributed to stagnant demand for canned product. Italy's exports in 1993/94 are estimated at 34,000 tons, the highest level in four years due to a devalued Lira and lower export prices.

SPAIN

Spanish canned pear production for 1993/94 reached an estimated 14,900 tons, based on a lower pear crop and revisions of the 1993 pack. Indications from 1994 suggest a slightly smaller pack. About 80 percent of the pear crop comes from Navarra region, the balance from Murcia. Reportedly only about three or four percent of the fresh pear crop were canned. As is the case with Spain's canned peach industry, the canned pear industry also faces restructuring that includes some consolidation and substantial increases in investment.

Spain is expected to export about 7,200 tons in 1993/93, an increase of 13 percent above the level in the previous year. The rise is attributed to a devaluation of the Spanish Peseta. Other EU countries took an estimated 87 percent of Spain's total canned pear exports in calendar 1993. Spain ranks a distant second after Italy in terms of canned pear exports.

AUSTRALIA

Production of canned pears for 1993/94 is estimated at 46,000 tons, slightly higher than the previous year. The Australian canned pear industry is focused on exports, as domestic consumption accounts for only about 21 percent of production. Stagnant consumption stems in part from improved availability of fresh fruit.

Australia is a major supplier of canned pears to the EU, which accounted for about a third of Australia's exports in 1993. Total exports in 1993/94 are estimated at 30,000 tons, down slightly from the previous year as lower-priced competitor product continues to displace Australian fruit. Australia entered the U.S. market after a two year hiatus, shipping 1,128 tons of canned pears. Australian canned Bartlett pears have faced an anti-dumping order in the United States since 1973. However, currently there is no cash deposit required on Australian product as the dumping margin was determined to be zero. This could encourage canned pear shipments from Australia to the United States.

Canned pear imports are estimated to have fallen to only 63 tons in 1992/93, due in part to anti-dumping action on product from China and greater availability of locally packed generic fruit. Local consumer preference in canned product has shifted somewhat to lower-priced generic labels as a result of the economic downturn in Australia.

SOUTH AFRICA

South Africa is a also an export-oriented producer of canned pears. Production in 1993/94 is estimated to have settled at 27,574 tons, slightly below last year's pack. The lifting of trade sanctions and recent favorable movements of exchange rates have brightened export prospects, especially to the United States. Among South Africa's major export markets are the EU countries and Japan.

JAPAN

The small scale of canned pear production in Japan approaches that of a cottage industry. Production for 1993/94 is revised downward slightly to 490 tons. Preliminary indications from the 1994 pack suggest a production level of about 500 tons for the coming year. Most pears grown in Japan are sand pears ("Nashi"), which are mainly marketed for fresh consumption. In view of the availability of low-priced imported canned pears, domestic production is expected to remain static for the foreseeable future. Japan will rely on imports to meet consumer demand from confectioners and restaurants, and for holiday gift-giving. The table below shows that Australia is the major supplier of canned pears to Japan.

JAPAN: Canned Pear Imports by Origin
(Calendar Years; Metric Tons, net wt.)

Supplier	1989	1990	1991	1992	1993	1994 (Jan-Jun)
Australia	4,027	4,329	4,944	5,305	5,172	2,144
So. Africa	1,025	1,092	1,044	1,456	1,495	879
U.S.	298	478	619	527	543	296
China	141	73	57	174	53	31
Others	235	287	188	203	178	195
TOTAL	5,726	6,259	6,852	7,665	7,441	3,545

Source: Customs Bureau, Japan Min. of Finance

CANNED FRUIT MIXTURES

The canned fruit mixtures situation is characterized by a moderate decline in production, stagnant exports, and some drawdown in stocks. Output of canned fruit mixtures in selected markets for 1993/94 is revised at about 196,000 tons, a drop of 10 percent from the previous year. Lower deliveries to canneries in South Africa and Greece account for most of the decline. EU countries pack about half the total output of the eight selected markets. Exports of canned fruit mixtures in 1993/94 are estimated at 150,700 tons, little changed from the previous year. Stocks are expected to decline to about 30,000 tons.

ITALY

Italy leads selected countries in terms of canned mixtures production. The revised estimate of the 1993 pack sets production at 73,000 tons for 1993/94. Initial indications of lower deliveries to canners will translate into a smaller pack for 1994. About 96 percent of Italian canned mixtures exports in calendar 1993 were destined for other EU countries. A devaluation of the Lira is expected to boost exports to 64,000 tons in 1993/94.

GREECE

Canned mixtures production for 1993/94 fell by half to about 11,180 tons, as fewer canners participated in the pack. Production is expected to shrink further in coming seasons due to slow demand and continued high interest rates. Industry sources feel that only improvement in the economies of markets such as Eastern Europe, the former Soviet Republics, and the Balkan countries will help alleviate the depressed situation. Furthermore, Greece's inability to ship directly to the former Yugoslavia has also dimmed export prospects. Greek exports continue to decline in step with a lower pack and reduced export availabilities. Canned mixtures exports in 1993/94 are estimated at 11,000 tons, about 43 percent below last year's volume.

AUSTRALIA

Australia is the third largest producer of canned mixtures after Italy and South Africa. Production for 1993/94 is estimated at 31,500 tons, little changed from the previous year. Canada is the most important export market of Australia, accounting for about a third of total canned mixtures exports.

SOUTH AFRICA

South Africa dominates canned mixtures production in the Southern Hemisphere. Like Australia and Italy, South Africa is an export-oriented producer. South African canned mixtures production declined in 1993/94, based on a decline in deliveries as profit-squeezed canners offered lower prices for fresh fruit.

JAPAN

Japan is a net importer of canned fruit mixtures, with a domestic industry producing only about 17 percent (and declining) of annual consumption. The continued appreciation of the Yen has generally helped boost consumption of canned deciduous fruit, including canned mixtures. Consumption in 1993/94 is estimated at about 15,100 tons. The major supplier of canned mixtures to Japan is the United States. The following table presents Japanese imports of canned mixtures and shows the relative importance of U.S. competitors in that market.

JAPAN: Canned Mixtures Imports by Origin (Calendar Years; Metric Tons, net wt.)

Supplier	1989	1990	1991	1992	1993	1994 (Jan-Jun)
U. S.	4,603	4,106	5,214	5,631	5,641	3,403
So. Africa	1,863	2,636	2,515	3,070	3,795	1,862
Australia	1,024	1,193	1,374	3,070	3,795	519
Chile	n/a	n/a	291	348	348	172
Greece	912	67	91	0	105	82
Italy	n/a	n/a	0	3	146	357
Others	426	108	8	30	94	124
TOTAL	8,828	8,110	9,493	10,396	11,002	6,519

Source: Customs Bureau, Japan Min. of Finance

CHILE

Canned mixtures production in Chile is targeted for foreign markets, where profits are higher. Production for 1993/94 is estimated at 4,050 tons, of which about 91 percent is slated for export markets. Unlike canned peaches, Chilean exports of canned mixtures benefit from a graduated rebate program which is provided to "non-traditional" exports. Under this program, an exporter receives a rebate of up to 10 percent of the FOB value on sales up to a total export value of $10 million per year. Beyond that level, the rebate declines to five percent up to the point total exports reach $15 million. After that, the rebate is reduced to three percent on sales up to a total value of $18 million. There is considerable excess capacity in this program, as the total export value of Chile's canned mixtures in calendar 1993 was $3.9 million.

CANNED APRICOTS

Total canned apricot production for 1993/94 in the four selected countries is estimated at about 75,000 tons, a decline of 25 percent from the previous year. A sharply lower Greek pack accounts for most of the fall in total production. Exports are expected to settle at 64,300 tons, in line with reductions in exportable supplies. Ever lower volumes from Greece are anticipated as the Sharka virus spreads among the orchards. Activity from commercial buyers is plummeting, forcing packers to seek markets among industrial buyers for bakery and confectionery products. Supermarkets are responding to the lack of consumer demand and allocating less shelf space to canned apricots.

GREECE

The volume of apricots delivered to canners for 1993/94 was about 50 percent below last season. This steep decline is due to slack demand for canned product from export markets and adequate carryover stocks. Quality of fresh fruit was adversely affected by above normal precipitation and persistent problems with the Sharka virus. Production for 1993/94 is revised to 27,350 tons, most of which will enter export channels. Slack demand and the Sharka virus are expected to limit deliveries of fresh fruit to processors in 1994 and contribute to a sharply lower pack for 1994/95.

SOUTH AFRICA

Production for 1993/94 is set at 25,696 tons based on revised government estimates. Despite sluggish demand from world markets, exports are forecast to rise to 25,000 tons in the current year. These sales are likely to be made at prices at least 30 percent lower than last season. Lower returns are expected to plague South Africa for the next few years until supply conditions balance in world markets.

SPAIN

Spain is the EU's second largest producer of canned apricots after Greece. Production in 1993/94 reached an estimated 13,800 tons, most of which entered export channels to surrounding EU countries. Spain is largely a nation of fresh apricot consumers, with only about seven percent of the apricot crop delivered to canners. The EU support scheme does not extend to canned apricots, a factor that could possibly lead to a reduction in canned apricot production in coming years.

OUTLOOK FOR U.S. EXPORTS OF CANNED FRUIT

The U.S. canned fruit industry will continue to face challenges both domestically and in export markets in the coming year. Exports will again face keen competition from EU product. The following table presents aggregate U.S. exports of canned fruit by type. Year end figures for 1993/94 show a decline in both volume and value for fruit mixtures, peaches and pears. Aggregate volume during 1993/94 fell by 14 percent from the year earlier period. However, the decline in total value was held at 11 percent, indicating a higher value product (e.g., snack packs) entered export channels. Total export value in 1993/94 was $55 million (FOB). The table shows that despite tough competition in world markets, U.S. canned peaches held fairly steady compared with other U.S. fruit.

U.S. Canned Fruit Exports
(Jun/May Year; Metric Tons, net wt.)

	1990/91	1991/92	1992/93	1993/94
Mixtures	28,074	31,080	34,895	27,974
Peach	18,647	20,054	19,815	19,309
Pear	3,521	5,758	3,905	2,890
TOTAL	50,242	56,892	58,616	50,173

Source: U.S. Census Bureau data

CANNED FRUIT MIXTURES

Fruit mixtures are the dominant element of U.S. trade in canned deciduous fruit. Exports in 1993/94 dropped 19 percent by volume and 14 percent by value. Strategic U.S. export markets include Canada and various Asian countries. The following table shows moderate increases were registered in Mexico, Korea, and Hong Kong, markets where U.S. exports are likely to increase through expanded product lines such as chunky fruit and snack-sized packs. High-cost producer Japan took advantage of comparatively lower priced imported canned fruit this past year. Increased competition from Australia and South Africa, and exchange rate movements in Canada and Japan, account for some of the fluctuation in these markets.

CANNED PEACHES

The 1993 canned peach pack is revised at 369,014 tons (see table below). Preliminary indications point to a pack of slightly over 400,000 tons for 1994.

Canned peach exports held up well during the 1993/94 season despite fierce competition from Greece. Declines of less than one percent in both volume (19,309 tons) and value ($18.97 million) were recorded. Among the major markets for U.S. canned peaches are Japan, Canada, Hong Kong, and Taiwan. Although starting from a comparatively low base, Central American markets registered growth of 34 percent in 1993/94. South American markets slipped 33 percent this year, and will likely remain erratic until their economies firm and import policies are reformed. Shipments to the Gulf States and Middle East have rebounded to the levels of five years ago, with exports nearly doubling last year and modest gains in 1993/94.

Industry sources are cautiously optimistic about prospects for Canada and Mexico in the wake of NAFTA implementation. However, there remains considerable concern about erosion of these markets by shipments from subsidizing suppliers. The following table shows that Canada, our NAFTA neighbor, imports an increasingly larger share of canned peaches from Greece.

CANADA: Canned Peach Imports
(Calendar Year; Metric Tons, net wt.)

Supplier	1990	1991	1992	1993	1994 (Jan-Jun)
Greece	8,775	6,661	8,769	11,180	5,781
Total EU	9,207	6,904	9,115	11,423	6,039
So. Africa	0	0	0	182	465
U.S.	1,102	2,003	2,129	2,887	1,682
Australia	4,955	5,441	4,042	3,963	2,085
Chile	795	1,161	424	484	387
Others	1,825	3,639	2,582	1,426	733
TOTAL	17,089	17,987	17,868	19,881	11,004

Source: Tiers Database, Statistics Canada

The United States is also an importer of sizeable quantities of canned peaches, primarily from Greece. Other suppliers include Chile, and occasionally, Italy and Spain. After a slow return to the U.S. market following the lifting of the trade ban, South African canned peaches made an impressive showing in 1993/94. The chart below presents U.S. trade in canned peaches with the European Union, 1970/71-1993/94, and shows the reversal from net exporter to net importer of product. Not only has the EU become the dominant supplier to the U.S., it has also displaced U.S. exports in some important growth markets (e.g., Japan, and NAFTA partners).

CANNED PEARS

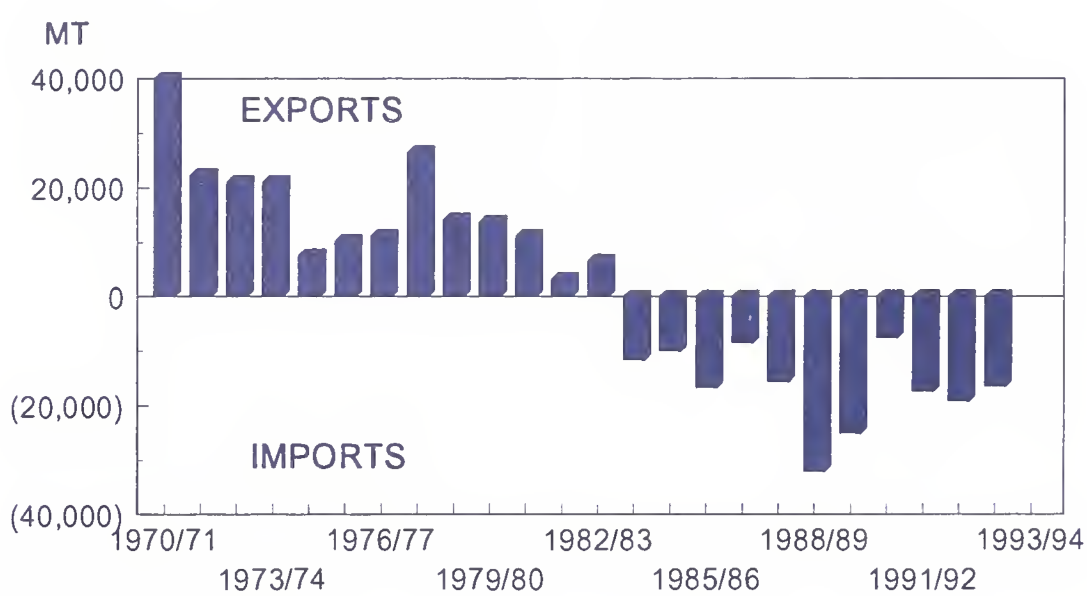
Canada, Japan, and Mexico are major markets for U.S. canned pears. Exports during 1993/94 declined by 35 percent, largely on lower shipments to Japan. Of future concern on the supply side of canned pears is the growth potential for pear production in both Chile and Argentina. Limited expansion in the fresh market could result in diversion of pears to the canning industry. This is a development that will bear on future prospects for U.S. canned pears in export markets.

(For further information, contact Ross G. Kreamer, 202-720-9903.)

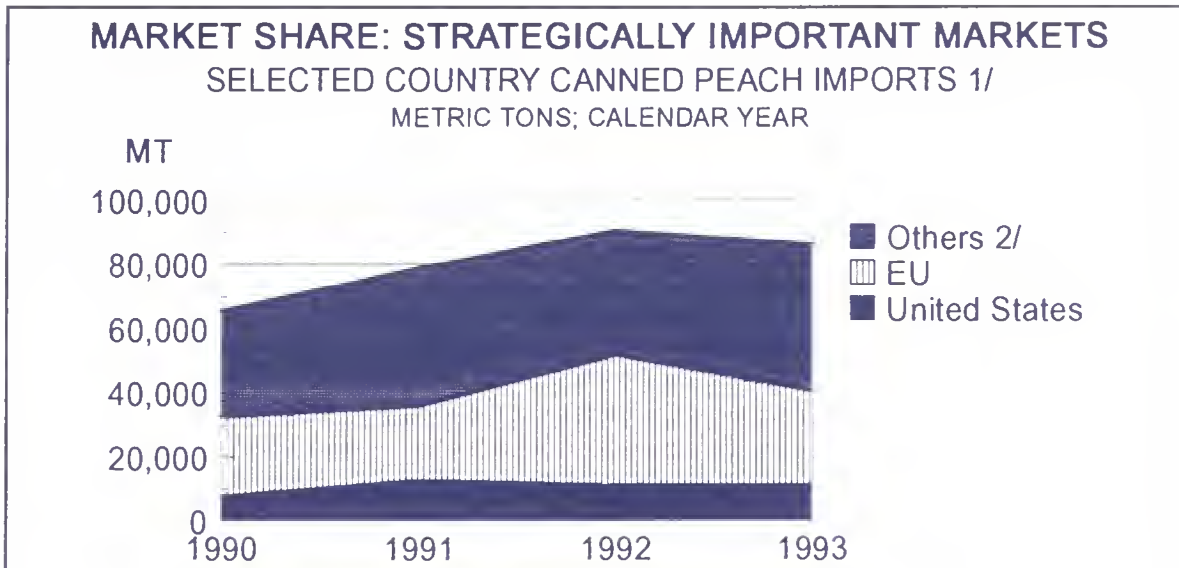
THE EBB AND FLOW: NET CANNED PEACH TRADE

U.S. EXPORTS TO EU & U.S. IMPORTS FROM EU

1970/71-1993/94 (JUN/MAY); METRIC TONS



Source: U.S. Census data



Source: Import data by market except for Mexico, which is on exports-to basis.
1/ Imports of Canada, Mexico, Japan, and Taiwan.
2/ Other suppliers include South Africa, Australia, and China.

UNITED STATES: Canned Fruit Mixtures Exports
(1988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95 (Jun/Aug)
Canada	4,758	3,830	7,809	7,770	6,542	5,677	1,171
Mexico	946	615	538	724	501	547	19
Japan	7,201	3,373	4,786	6,398	4,708	6,205	1,260
Hong Kong	1,433	929	2,782	3,593	3,753	3,999	1,271
Taiwan	447	376	649	984	1,709	1,106	247
Philippines	1,597	2,905	2,636	2,164	3,337	1,289	270
Singapore	1,403	1,798	2,105	2,089	2,662	2,575	1,142
Saudi Arabia	1,018	821	1,977	1,514	3,096	1,387	5
Panama	530	851	1,119	1,100	1,138	863	198
Sweden	304	789	753	709	898	289	66
Others	3,336	2,810	2,920	4,035	6,552	4,037	1,299
TOTAL	22,973	19,097	28,074	31,080	34,896	27,974	6,948

Source: U.S. Census Bureau data
1/ Marketing year is June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

UNITED STATES: Canned Peach Exports
(19988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95 (Jun/Aug)
Canada	1,755	1,183	1,857	2,427	2,691	2,809	757
Mexico	273	1,653	653	1,581	1,775	1,400	246
Japan	9,013	5,850	7,420	7,593	5,812	5,674	1,106
Taiwan	3,154	1,569	2,654	2,702	2,460	1,719	407
Hong Kong	489	379	1,347	1,812	1,467	1,768	337
Singapore	499	941	597	640	754	1,194	247
Philippines	376	755	412	552	744	382	115
Panama	407	385	358	410	266	325	35
Colombia	19	29	73	267	58	98	0
Saudi Arabia	273	249	267	266	532	460	6
Others	1,278	1,365	3,009	1,804	3,256	3,480	1,045
TOTAL	17,538	14,358	18,647	20,054	19,815	19,309	4,301

Source: U.S. Census Bureau data
1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

UNITED STATES: Canned Peach Imports
(19988/89-1994/95; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	19993/94	1994/95 (Jun/Jul)
Greece	11,038	21,208	9,074	17,608	19,021	15,515	2,077
Chile	4,420	9,750	4,527	879	879	1,076	410
Argentina	1,030	4,666	107	349	373	44	0
Spain	1,129	2,803	91	142	986	829	48
Italy	69	1,428	0	0	18	316	0
Mexico	292	675	990	1	0	0	0
South Africa	0	0	0	116	382	3,319	762
Others	253	652	229	166	262	112	17
TOTAL	18,231	41,182	15,018	19,261	21,921	21,211	3,314

Source: U.S. Census Bureau data
1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

UNITED STATES: Canned Pear Exports
(19988/89-1993/94; Metric Tons, net weight) 1/

Country	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95 (Jun/Aug)
Canada	96	259	552	1,288	1,508	1,554	430
Mexico	9	362	239	381	321	164	14
France	0	0	0	1,801	76	5	0
Italy	0	17	6	118	0	0	9
Denmark	0	0	195	245	71	0	0
Sweden	17	19	325	291	140	4	0
Japan	221	442	916	845	506	402	78
Singapore	62	82	147	109	76	88	28
Costa Rica	9	26	106	188	111	137	0
Others	617	580	1,035	492	1,096	536	545
TOTAL	1,031	1,787	3,521	5,758	3,905	2,890	632

Source: U.S. Census Bureau data
1/ Marketing year: June/May; one metric ton equals 48.99 standard 45lb. net cases of 24x2 1/2 cans.

U.S. Cling Peach Situation and Outlook 1/
(Metric Tons)

	1991/92	1992/93	1993/94	1994/95
Deliveries to Canners	452,076	469,112	479,866	485,809
Paid tons Packed	424,565	487,258	444,324	464,567
Peach Pack 2/	345,132	406,654	369,014	400,081
Beginning Stocks	46,356	30,618	65,319	
Imports	19,261	21,921	21,211	
Total Supply 3/	410,749	459,193	455,544	
Apparent Consumption 4/	360,077	374,059	370,916	
Exports	20,054	19,815	19,309	
Ending Stocks 5/	30,618	65,319	65,319	

Source: California Cling Peach Advisory Board, 1994, and U.S. Census data
1/ Data show trends in the U.S. situation; 1994/95 data are forecast.
2/ Pack estimates are for crop year in California.
3/ Accounts only for California production, which is about 98 percent of total U.S. pack.
4/ Total supply less exports and stocks held by canners.
5/ Ending stocks are supplies held by canners at end of season.

Canned Peaches: Production, Supply, and Distribution
(Metric Tons, net weight)/1

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
France							
1990/91	3,800	34,300	31,500	69,600	2,700	61,600	5,300
1991/92	5,300	31,400	27,800	64,500	3,800	57,700	3,000
1992/93	3,000	32,200	24,500	59,700	4,000	51,300	4,400
1993/94	4,400	27,700	22,000	54,100	5,000	48,100	1,000
Greece							
1990/91	35,500	251,876	604	287,980	247,767	16,713	23,500
1991/92	23,500	317,542	514	341,556	309,836	18,720	13,000
1992/93	13,000	372,697	275	385,972	312,875	17,097	56,000
1993/94	56,000	288,597	250	344,847	310,000	10,847	24,000
Italy							
1990/91	46,600	72,000	11,300	129,900	41,200	51,000	37,700
1991/92	37,700	81,000	11,400	130,100	44,000	51,000	35,100
1992/93	35,100	98,000	9,000	142,100	40,000	48,000	54,100
1993/94	54,100	55,000	8,800	117,900	43,000	45,000	29,900
Spain							
1990/91	18,203	65,000	8,912	92,115	8,301	77,000	6,814
1991/92	6,814	91,400	6,713	104,927	9,758	79,169	16,000
1992/93	16,000	131,500	1,800	149,300	20,900	93,400	35,000
1993/94	35,000	105,700	900	141,600	32,500	93,500	15,600
Total EC							
1990/91	104,103	423,176	52,316	579,595	299,968	206,313	73,314
1991/92	73,314	521,342	46,427	641,083	367,394	206,589	67,100
1992/93	67,100	634,397	35,575	737,072	377,775	209,797	149,500
1993/94	149,500	476,997	31,950	658,447	390,500	197,447	70,500
Argentina							
1990/91	1,149	31,000	4,000	36,149	1,889	34,111	149
1991/92	149	49,000	8,622	57,771	7,761	48,370	1,640
1992/93	1,640	31,000	16,400	49,040	900	46,590	1,550
1993/94	1,550	50,000	9,000	60,550	9,000	49,000	2,550
Australia							
1990/91	9,492	30,000	3,583	43,075	19,770	18,900	4,405
1991/92	4,405	31,600	2,545	38,550	13,619	18,900	6,031
1992/93	6,031	33,200	319	39,550	12,400	18,500	8,650
1993/94	8,650	34,000	500	43,150	14,000	19,000	10,150
Chile							
1990/91	950	24,000	0	24,950	17,000	7,600	350
1991/92	350	31,000	0	31,350	20,200	10,000	1,150
1992/93	1,150	34,200	0	35,350	24,543	10,500	307
1993/94	307	33,500	0	33,807	22,200	11,100	507
Japan							
1990/91	6,000	20,927	42,189	69,116	10	66,106	3,000
1991/92	3,000	22,208	53,569	78,777	5	68,772	10,000
1992/93	10,000	19,148	45,428	74,576	3	64,573	10,000
1993/94	10,000	18,147	65,551	93,698	8	89,690	4,000
South Africa							
1990/91	29,722	65,815	0	95,537	56,679	11,650	27,208
1991/92	27,208	65,557	0	92,765	50,840	11,857	30,068
1992/93	33,538	74,619	0	108,157	56,134	11,875	40,148
1993/94	40,148	65,394	0	105,542	60,000	12,042	33,500
Total							
1990/91	151,416	594,918	102,088	848,422	395,316	344,680	108,426
1991/92	108,426	720,707	111,163	940,296	459,819	364,488	119,459
1992/93	119,459	826,564	97,722	1,036,631	468,145	369,838	207,165
1993/94	210,155	678,038	107,001	995,194	495,708	378,279	121,207

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans
2/ MY 1993/94 includes 1993 packs in N.Hemisphere and early 1994 packs in S.Hemisphere.

Canned Pears: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
France							
1990/91	6,900	24,500	20,800	52,200	1,400	43,400	7,400
1991/92	7,400	18,400	25,800	51,600	1,500	46,200	3,900
1992/93	3,900	28,500	17,700	50,100	900	42,100	7,100
1993/94	7,100	27,200	18,400	52,700	2,200	45,000	5,500
Italy							
1990/91	7,360	53,000	2,470	62,830	32,760	15,500	14,570
1991/92	14,570	34,000	2,480	51,050	29,700	15,000	6,350
1992/93	6,350	76,000	1,000	83,350	33,000	15,000	35,350
1993/94	35,350	59,000	0	94,350	34,000	15,000	45,350
Spain							
1990/91	0	11,800	309	12,109	5,758	6,351	0
1991/92	0	8,800	343	9,143	4,443	4,700	0
1992/93	0	16,200	1,000	17,200	6,400	6,200	4,600
1993/94	4,600	14,900	200	19,700	7,200	6,400	6,100
Total EC							
1990/91	14,260	89,300	23,579	127,139	39,918	65,251	21,970
1991/92	21,970	61,200	28,623	111,793	35,643	65,900	10,250
1992/93	10,250	120,700	19,700	150,650	40,300	63,300	47,450
1993/94	47,050	101,100	18,600	166,750	43,400	66,400	56,950
Australia							
1990/91	16,946	42,000	580	59,526	41,466	6,000	12,060
1991/92	12,060	55,000	858	67,918	41,709	7,000	19,209
1992/93	19,209	44,900	63	64,172	31,400	9,000	23,772
1993/94	23,772	46,000	500	70,272	30,000	10,000	30,272
Japan							
1990/91	600	556	6,948	8,104	19	7,385	700
1991/92	700	571	7,411	8,682	10	7,872	800
1992/93	800	585	6,763	8,148	14	7,634	500
1993/94	500	490	7,423	8,413	5	8,108	300
South Africa							
1990/91	7,292	27,668	0	34,960	25,104	2,876	6,980
1991/92	6,980	20,798	0	27,778	23,786	2,902	1,090
1992/93	1,090	28,635	0	26,725	20,033	2,879	4,813
1993/94	4,813	27,574	0	32,387	23,000	2,987	6,400
Total							
1990/91	39,098	159,524	31,107	229,729	106,507	81,512	41,710
1991/92	41,710	137,569	36,892	216,171	101,148	83,674	31,349
1992/93	31,349	194,820	26,526	252,695	93,747	82,813	55,306
1993/94	76,135	175,164	26,523	277,822	96,405	87,495	93,922

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans
2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.

Note: Data for the United States are no longer available.

Canned Fruit Mixtures: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumptn.	Ending Stocks
France							
1990/91	10,300	24,900	31,400	66,600	5,000	50,400	11,200
1991/92	11,200	23,000	27,900	62,100	5,900	47,400	8,800
1992/93	8,800	24,400	31,400	64,600	7,100	45,300	12,200
1993/94	12,200	22,500	29,200	63,900	9,500	45,500	8,900
Greece							
1990/91	503	22,618	29	23,150	20,748	1,500	902
1991/92	902	26,930	151	27,983	25,793	1,400	790
1992/93	790	22,440	328	23,558	19,306	1,300	2,952
1993/94	2,952	11,180	250	14,382	11,000	1,300	2,082
Italy							
1990/91	15,200	72,000	1,060	88,260	62,620	25,640	0
1991/92	0	75,000	1,500	76,500	58,000	18,500	0
1992/93	0	78,000	1,300	79,300	62,500	16,800	0
1993/94	0	73,000	1,600	74,600	64,000	10,600	0
Total EC							
1990/91	26,003	119,518	32,489	178,010	88,368	77,540	12,102
1991/92	12,102	124,930	29,551	166,583	89,693	67,300	9,590
1992/93	9,590	124,840	33,028	167,458	88,906	63,400	15,152
1993/94	15,152	106,680	31,050	152,882	84,500	57,400	10,982
Argentina							
1990/91	na	na	na	na	na	na	585
1991/92	585	7,000	242	7,927	135	6,692	1,000
1992/93	1,000	5,500	850	7,350	40	6,710	600
1993/94	600	8,000	400	9,000	500	7,500	1,000
Australia							
1990/91	1,769	30,400	0	32,169	21,035	10,900	234
1991/92	234	34,100	0	34,334	22,014	12,000	320
1992/93	320	32,200	0	32,520	17,102	13,700	1,718
1993/94	1,718	31,500	0	33,218	19,000	12,000	2,218
Chile							
1990/91	50	3,100	0	3,150	2,800	300	50
1991/92	50	2,650	0	2,700	2,350	310	40
1992/93	40	4,150	0	4,190	3,865	310	15
1993/94	15	4,050	0	4,065	3,700	320	45
Japan							
1990/91	1,000	4,173	10,197	15,370	0	13,870	1,500
1991/92	1,500	3,370	11,098	15,968	0	13,968	2,000
1992/93	2,000	3,023	9,390	14,413	2	13,411	1,000
1993/94	1,000	2,511	12,068	15,579	12	15,067	500
South Africa							
1990/91	5,377	42,378	0	47,755	37,229	4,961	5,565
1991/92	5,565	50,372	0	55,937	34,085	4,954	16,898
1992/93	16,898	48,494	0	65,392	41,210	4,970	19,212
1993/94	19,212	43,188	0	62,400	43,000	5,000	14,400
Total							
1990/91	34,199	199,569	42,686	276,454	149,432	107,571	20,036
1991/92	20,036	222,422	40,891	283,349	148,277	105,224	29,848
1992/93	29,848	218,207	43,268	291,323	151,125	102,501	37,697
1993/94	37,697	195,929	43,518	277,144	150,712	97,287	29,145

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans
2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.
note: Data for the United States are no longer available.

Canned Apricots: Production, Supply, and Distribution
(Metric Tons, net weight) 1/

Country/ Year 2/	Beginning Stocks	Production	Imports	Supply/ Distribt.	Exports	Domestic Consumpt.	Ending Stocks
Australia							
1990/91	4,007	8,700	905	13,612	2,645	7,200	3,767
1991/92	3,767	9,800	1,255	14,822	1,860	7,000	5,962
1992/93	5,962	12,000	710	18,672	1,938	8,600	8,134
1993/94	8,134	8,095	700	16,929	2,000	9,000	5,929
Greece							
1990/91	308	47,352	109	47,769	38,224	1,200	8,346
1991/92	8,346	36,730	22	45,098	43,091	1,100	907
1992/93	907	45,782	210	46,899	38,015	1,200	7,684
1993/94	7,684	27,353	200	35,237	27,000	1,200	7,037
South Africa							
1990/91	2,675	16,720	0	19,395	15,900	745	2,750
1991/92	2,750	24,308	0	27,058	16,782	758	9,518
1992/93	9,518	24,247	0	33,765	21,273	765	11,727
1993/94	11,727	25,696	0	37,423	25,000	773	11,650
Spain							
1990/91	13,076	12,000	75	25,151	8,196	5,500	11,455
1991/92	11,455	28,595	208	40,258	29,294	5,464	5,500
1992/93	5,500	17,700	100	23,300	17,600	4,500	1,200
1993/94	1,200	13,800	100	15,100	10,300	4,800	0
Total							
1990/91	20,066	84,772	1,089	105,928	64,965	14,645	26,318
1991/92	26,318	99,433	1,485	127,236	91,027	14,322	21,887
1992/93	21,887	99,729	1,020	122,636	78,826	15,065	28,745
1993/94	28,745	74,944	1,000	104,689	64,300	15,773	24,616

1/ One metric ton= 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans.

2/ The 1993/94 marketing year includes 1993 packs in the Northern Hemisphere and early 1994 packs in the Southern Hemisphere.

Note: Data for the United States are no longer available.

THE ACCESSION OF AUSTRIA, FINLAND, NORWAY, AND SWEDEN TO THE EUROPEAN UNION: WILL IT HURT OR HELP U.S. EXPORT OPPORTUNITIES FOR FRESH AND PROCESSED FRUITS?

Before the end of 1994, Austria, Finland, Sweden, and Norway, four members of the European Free Trade Agreement, will vote whether to become members of European Union (EU). Assuming all 12 EU members ratify, accession would become effective on January 1, 1995. The accession would have direct implications for U.S. agricultural trade because the applicant countries would adopt the EU's tariff schedule, reference price system, intervention policy, export licensing, and other trade and supply control measures. For U.S. exports of raisins, apples, pears, and almonds, there are likely to be gains and losses. Maintaining market share will require that U.S. products be the highest quality at a competitive price. The stakes are high for U.S. exporters of horticultural products because total exports of U.S. fruit and vegetables to EFTA countries totaled $132.1 million in 1993.

Background

The European Free Trade Agreement (EFTA) is comprised of Austria, Finland, Iceland, Liechtenstein, Norway, Sweden, and Switzerland. For purposes of this paper, the term *EFTA countries* shall refer to only Austria, Finland, Norway, and Sweden.

In March 1994, Austria, Finland, Sweden, and Norway reached an agreement with the European Union (EU) on accession. During the Fall of 1994, each country will hold referenda on EU membership. Thus far, Finland and Austria have voted positively for accession. The next step is for each of 12 EU members to vote on ratifying the accession agreement. Assuming all 12 EU countries ratify the accession, EU entry would commence on January 1, 1995.

The accession will have direct implications for U.S. trade because the applicant countries' will be adopting the EU's trade and supply control regimes. The stakes are high for U.S. exporters of horticultural products. Exports of U.S. fruit and vegetables to Austria, Finland, Norway, and Sweden totaled $132.1 million in 1993 (Austria - $7.3 million, Finland - $21.4 million, Norway - $33.8 million, and Sweden - $ 69.6 million). The main horticultural export items are raisins, apples, pears, almonds, plums, and wine.

As a result of accession, certain U.S. products may be displaced in this region as they face higher tariff levels. To maintain current U.S. market access, it will be vital to incorporate the EFTA's separate Uruguay Round (UR) commitments into the EU's commitments. Furthermore, the EU's duty-free access to the applicants' markets will increase the EU's competitive advantage and possibly displace U.S. commodities. The adoption of the EU's preferential agreements, such as those with the Asian, Caribbean, and Pacific (ACP) countries, will result in additional competition for U.S. products in these markets.

On the other hand, EFTA country accession may benefit U.S. access because of the uniformity of phytosanitary standards and labeling requirements that results from EU membership. U.S. exporters would face the regulations of a single EU system and not those of each EFTA country.

To gauge the potential impact of accession on

U.S. fruit markets, the previous factors will be discussed for selected U.S. commodities: almonds, fresh deciduous fruit, and dried fruit. Information for this analysis was obtained from U.S. Agricultural Attache reports, Uruguay Round working papers, and U.S. industry contacts.

Almonds

In calendar year 1993, the United States exported 8,670 tons of almonds (all preparations) to the EFTA countries valued at $34 million. Sweden is the largest market, comprising about 60 percent of U.S. almond exports in 1993 to EFTA countries. Almonds are the highest value U.S. horticultural product exported to Austria and the second highest in value exported to Norway and Sweden.

Exports of almonds to the EU totaled 88,554 tons in 1993 valued at $339 million. The expansion of the EU market to include these four countries will make it the largest importer of almonds in the world surpassing Asian markets.

Total U.S. almond exports, in tons, have shown little growth to EFTA countries the last 5 years attributed to the strengthening U.S. dollar. Exports to the EU have been falling to EU countries in recent years (see following chart) because of plentiful spanish supplies and U.S. dollar exchange rates.

Because of EU accession, U.S. almond access may be disadvantaged in these countries by tariff levels and quota rates. Industry sources in the United States estimate the total duty paid could increase by 13.7 percent after accession, or a value of $1.9 million. United States' almonds will ultimately cost more for importers to buy. The European Union continues to maintain an external tariff rate quota of 45,000 tons at 2 percent in-quota and 7 percent out-of-quota, while under the Uruguay Round all four EFTA countries' tariffs were reduced significantly and no TRQ's are required (see Table 1). Sweden, for example, is required to admit almonds free under its UR commitments, while under the EU's UR commitments the duty could be 3.5 percent.

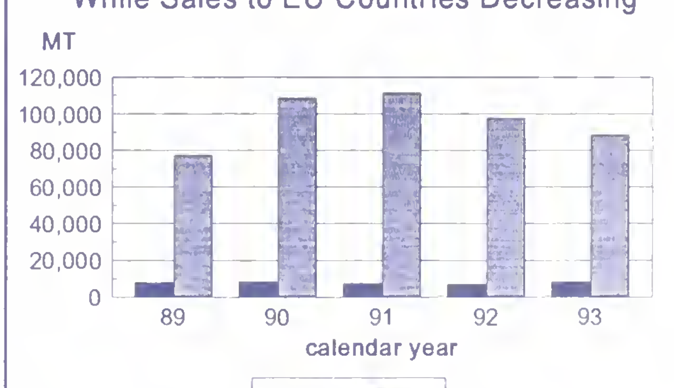
A key disadvantage of EFTA country accession for U.S. trade is that other almond producing countries in the EU, primarily Spain, will have a competitive advantage because importers will not have to pay the tariffs and duties required for U.S. products and other 3rd country suppliers. Spain is the second-leading almond supplier to EU member countries after the United States. Spain's almonds exports to EU members totaled $94 million (23,000 tons) in 1992, while the United States exported $331 million (94,000 tons). Spain's market share is forecast to increase after accession.

Nonetheless, Spain's almond production level is still relatively small compared with that of the United States, and its access to the new EU countries may not result in a significant displacement of U.S. market share, which averages 90 percent in each of the 4 countries.

There are mitigating factors in this gloomy picture. In Norway, despite expectations of some shrinkage in marketing opportunities for U.S. sales, new opportunities may emerge as previous barriers to trade fall such as prohibitively high tariffs, monopoly practices, and domestic import restrictions. Additionally, U.S. exporters will be able to apply their Norwegian marketing lessons in other EU member state markets. Second, under the UR, the EU has agreed to reduce its tariff by 50 percent for shelled almonds, thus giving U.S. exporters some relief.

Finally, assuming EU members will have improved access to almond markets in these 4

U.S. Almond Sales to EFTA Countries Flat, While Sales to EU Countries Decreasing



EFTA countries Austria, Finland, Norway, Sweden
Source U.S Census Bureau
All almond preparations

countries, the best prospect for competing U.S. exporters is to continue providing the highest quality product at a competitive price. The impacts of accession will vary depending on supply, demand, currency fluctuations, and marketing efforts of the United States and EU member countries.

TABLE 1. ALMONDS

Country	U.S. Exports (1993) 4/	U.S. Market Share (1993)	Country's Final Duty 1/	EU's Final Duty 1/
Sweden (shelled)	$21.5 million	90%	free	3.5 %
Norway	$8.2 million	75% 2/	<0.1% 3/	3.5%
Finland	$3.5 million	89%	2.6%	3.5%
Austria	$2.3 million	90%	free	3.5%

Notes:

1/ Uruguay Round proposal at the end of the period.
2/ Market share estimate based on U.S. market size for all tree nuts ranging from 65% to 90%.
3/ Tariff estimated using U.S. FOB value of $3.13/kg, exchange rate of NOK 6.21/US$, and specific duty of NOK 0.02/kg.
4/ U.S. Census Bureau (calendar year FOB basis)

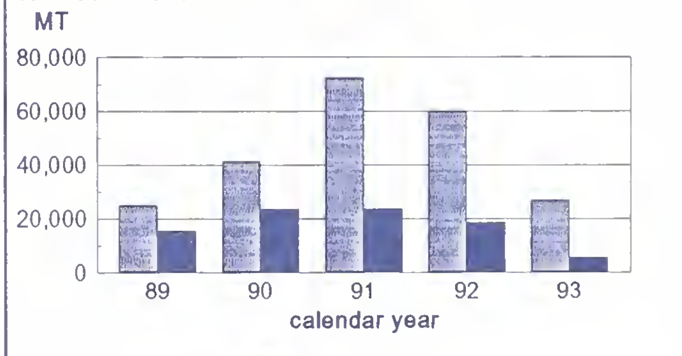
Deciduous Fruit

In 1993, total exports of U.S. apples and pears to the EFTA countries were $5.2 million FOB basis comprised of $2.3 million in apple exports and $2.9 million in pear exports. These figures are down from the previous year as the result of increased availability of EU product and an appreciating dollar.

Among the EFTA countries, Sweden is the largest importer of U.S. apples--$1 million were imported in 1993 which was down from $1.5 million the previous year. Sweden is also the largest EFTA country export market for U.S. pears comprising roughly 95 percent, while globally, Sweden is the 4th largest market for U.S. pears. The past year was an excellent pear marketing year in Sweden for the United States--U.S. market share, by volume, increased from 14.8 to 26.6 percent.

For Norway, imports of U.S. pears and apples dropped dramatically from 1992 to 1993. The drop was attributed to the high cost of U.S. apples with quality being met by lower priced product from Italy and France.

Exports of U.S. Apples Decreasing to Both EU and EFTA Countries in Recent Years



EFTA: Austria, Finland, Norway, Sweden
EU: 12 countries
Source: Eurostat and U.S. Census Bureau

The impact on U.S. trade resulting from accession will be most acute because of the overall increase in tariffs to about 35 percent, under the EU's UR commitments, from the zero or low tariffs under the EFTA countries commitments during most months. France, the Netherlands, and Italy will have an even more significant price advantage over the United States because of the increase in ad valorem duties.

Exports of U.S. pears to Sweden, in addition to apples, will be impacted the greatest because both commodities could face a ten-fold increase in tariffs after accession (see chart). Sweden's tariffs on apples, under its UR commitments, would only be zero to 3 percent, while under the EU the tariff level will range from about 32 to 39 percent throughout the year. Norway GATT commitments call for a zero duty from December 1 to April 30, but the rest of the year, duties will be 221 percent on apples and 148 percent on pears.

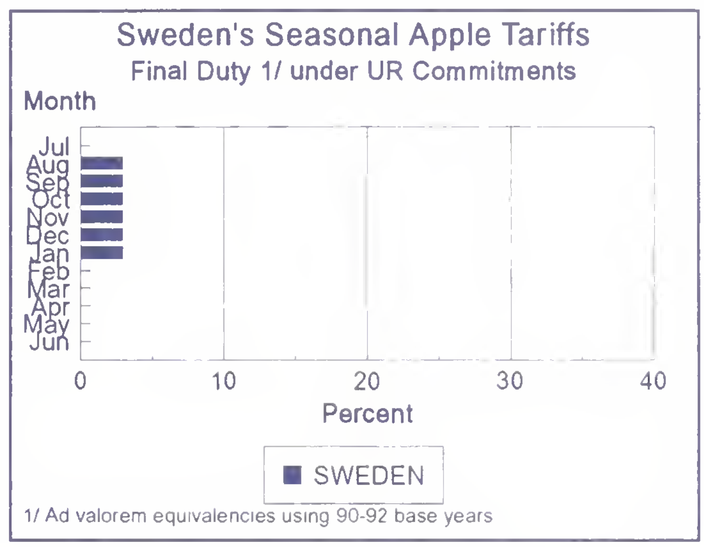
Austrian accession to the EU will intensify trade with other member countries. In particular, the market share for northwestern Italian apples will increase in western Austria, where production is lower than the rest of the country.

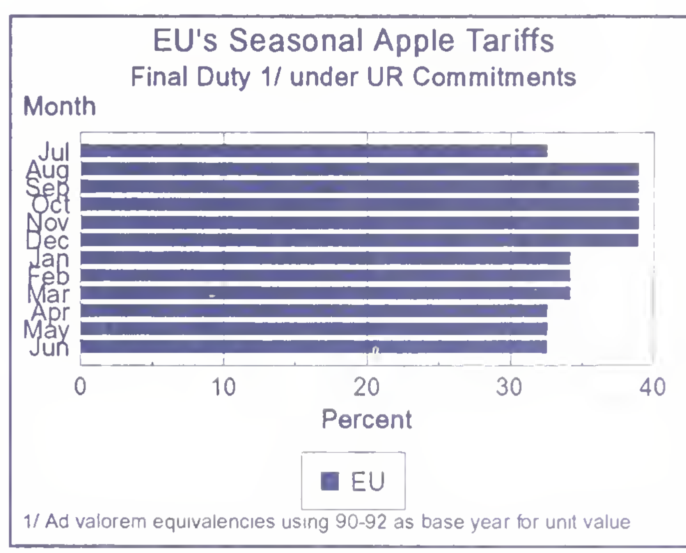
The proposed accession of Austria, Finland, Norway, and Sweden cannot improve the outlook for U.S. deciduous fruit exports for other reasons. Assuming the countries accede on January 1, 1995, each country will have to adjust to the EU's Common Agricultural Policy (CAP). This will necessitate the institution of the EU's reference prices, intervention, export licenses, and other bureaucratic requirements not in effect prior to joining the EU. According to some fruit traders in these countries, these programs will probably hinder trade with non-EU countries such as the United States. Further, free imports of apples and pears from EU countries, whose production continues to climb, will hamper U.S. efforts to compete in the market.

EFTA country accession may yield some benefits for U.S. trade because it will also impact on competing Southern Hemisphere countries who must face the same tariff levels as the United States. In recent years, countries such as Chile, Argentina, and New Zealand have relied heavily on the European market for a large share of export earnings.

Second, accession will remove restrictive trade barriers such as open and closed seasons. Certain United States industry sources report it may be less cumbersome to only have to work with one system instead of a myriad of requirements for 4 separate countries.

Third, under the UR, the EU has agreed to reduce its tariff on apples by 50 percent between January and March, and by 36 percent between August and December so that the average tariff year-round equals about 35 percent (see chart and Table 2).





In summary, the size of the EU apple harvest may impact more on U.S. market share in EFTA countries than the trade regime changes resulting from the EFTA country accession. Sales of U.S. apples to the EU have decreased significantly following the bumper crop in 1992, both to the EU and to EFTA countries. Given the relative success of selling U.S. apples in the EU, this suggests that EU accession for the EFTA may not directly hinder sales.

TABLE 2. DECIDUOUS FRUIT

Country/Commodity	U.S. Exports (1993) 7/	U.S. Market Share (1993)	Country's Final Duty 1/	EU's Final Duty 1/
SWEDEN				
Apples	$1.1 million	10%	free - 3% 2/	35% 3/
Pears	$2.8 million	23%	free - 4% 2/	40% 4/
FINLAND				
Apples	$780,000	30%	5.1% - 43% 5/	35%
NORWAY				
Apples	$380,000	16%	0% - 221% 6/	35%
Pears	$100,000	14%	0% - 148% 6/	40%

Notes:

1/ Uruguay Round proposal at the end of the period.
2/ For apples, free during Jan. 24 - July 31 and 3% during Aug. 1 - Jan. 23. For pears, free during Aug. 1 - Oct. 31 and 4% during Nov. 1 - July 31. Tariff estimated using specific duty of KER 25/100 kg for both apples and pears, exchange rate of KER 7.8/US$, and 1990 - 1992 export value and volume (Swedish statistics).
3/ Estimated average ad valorem duty. Actual seasonal tariffs are 11.2% + 238ECU/ton, 6.4% + 238ECU/ton, and 4.8% + 238 ECU/MT. Equivalency based on 1990-92 average U.S. apple value of $1.00/kg (CIF), and exchange rate of US$1.17/ECU (1992).
4/ Calculated on average ad valorem duty of 8.6% + 238 ECU/MT, 1990-92 average U.S. pear value of $0.90/kg (CIF).
5/ During Dec. 1 - Feb. 29, 5.1%; during Mar. 1 - June 30, 6.4%, during July 1 - Nov. 30, 43%.
6/ Duty of 0% from December 1 to April 30, and 221% percent on apples and 148 percent on pears from May 1 - November 30.
7/ U.S. Census Bureau (calendar year FOB basis)

Dried Fruit

The United States is the dominant supplier of raisins and prunes to the EFTA countries with total exports in calendar year 1993 valued at $30.1 million. The market share for U.S. prunes in Sweden is 98% valued at $5.9 million. U.S. raisin exports, the highest value dried fruit product, totaled $17 million with U.S. market share averaging about 80 percent. In 1993, U.S. exports of prunes and raisins to the EU totaled $142.4 million.

As the result of EFTA country accession U.S.

market share may be displaced by other EU member suppliers such as Italy and Spain who will enjoy a tariff-free market. Importers will simply have to pay more to import U.S. dried fruit. As shown in Table 3, the tariff on raisins will be 2.4 percent under the EU's GATT commitments, while a zero tariff is imposed for Sweden and Norway under their GATT commitments.

However, the dried fruit trade regime under the EU may not seriously disrupt existing EFTA country markets for U.S. exporters. Under the UR, the EU is required to reduce the minimum import price (MIP), similar to the reference price system for apples. Imports valued below a fixed reference price are charged an additional duty. Fortunately, U.S. imports have not been subject to the countervailing duty because prices have been above the minimum import price.

Finland is an exception to tariffs generally rising as the result of EFTA country accession. U.S. exporters of raisins to Finland could benefit slightly because the tariff decreases under the EU to 2.4 percent from Finland's 2.6 percent.

TABLE 3. DRIED FRUIT

Country/Commodity	U.S. Exports (1993)	U.S. Market Share (1993)	Country's Final Duty	EU's Final Duty
FINLAND				
Prunes	$5.0 million	93%	3.4%	9.6%
Raisins	$3.8 million	80%	2.6%	2.4%
SWEDEN				
Prunes	$5.9 million	98%	Free	9.6%
Raisins	$8.7 million	92%	Free	2.4%
NORWAY				
Prunes	$2.4 million	75% 2/	Free	9.6%
Raisins	$4.3 million	75% 2/	Free	2.4%

Notes:

1/ / U.S. Census Bureau (calendar year FOB basis)
2/ Estimate is average of 65% - 90% overall market share for all tree nuts.

(Note: Prune value of $2.11/kg (CIF) in 1992 and raisin value of $1.75/kg (CIF) in 1992.)

The next steps of the accession process

Thus far, Austria and Finland voted positively for accession. Following is the schedule for the near future.

- November 13: Sweden votes.
- November 27/28: Norway votes.
- December: Ratification of Accession Agreements by 12 EU Member States
- January 1, 1995: Implementation of Accession if all 12 EU countries ratify the accession agreements.

Soliciting Advice from the U.S. Fruit Industry

This paper is intended to illustrate some of the issues surrounding accession of Austria, Finland, Norway, and Sweden, and to demonstrate how U.S. fruit markets could possibly be affected.

According to GATT regulations, the United States will have an opportunity to negotiate compensation for products adversely affected by accession.

Comments from the U.S. horticultural industry would be welcome. Should you wish to send comments or if you have any questions, please contact Casey Bean, FAS/HTP at (202) 720-4620/phone and (202) 720-3799/fax or Aileen Mannix, FAS/ITP at (202) 720-1329/phone and (202) 690-2079. Correspondence may also be mailed to the following address: Casey Bean or Aileen Mannix, USDA/FAS, 14th & Independence Ave., S.W., Washington, D.C., 20250.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
AUG 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
MEXICO		4,893	9,179	16,924	26,259	152,059	2,686	5,593	9,058	15,046	86,274
TAIWAN		5,476	11,242	7,610	14,626	99,053	3,558	9,144	4,825	11,292	75,244
CANADA		4,813	7,620	9,313	14,232	80,913	4,110	5,631	7,738	10,181	59,914
HONG KONG		2,570	4,114	5,697	8,933	61,585	1,606	2,475	3,617	5,094	33,749
EU		335	1,263	424	4,684	31,981	253	842	323	2,492	16,599
THAILAND		718	618	2,815	3,058	31,005	548	420	2,077	1,913	21,277
OTHER		4,072	9,945	7,192	21,484	151,980	2,656	5,296	4,446	11,891	80,317
Subtotal:-----		22,877	43,983	49,976	93,276	608,577	15,415	29,402	32,085	57,908	373,374
FR. PEARS(JUL)	MT										
MEXICO		2,548	3,656	4,263	7,327	53,629	1,316	1,585	2,253	3,379	26,653
CANADA		4,663	6,384	6,991	8,861	39,645	2,879	3,228	4,727	5,032	26,222
TAIWAN		0	110	0	110	8,059	0	89	0	89	4,834
OTHER		97	410	191	982	27,000	62	360	116	680	13,743
Subtotal:-----		7,308	10,561	11,445	17,280	128,332	4,257	5,263	7,096	9,180	71,452
APRICOTS(MAY)	MT										
CANADA		121	22	2,911	3,044	3,030	137	19	3,895	3,181	4,043
MEXICO		639	194	810	3,487	1,515	502	108	649	2,452	1,183
EU		0	0	309	206	317	0	0	949	604	955
OTHER		118	357	227	588	354	135	721	321	1,030	487
Subtotal:-----		879	572	4,257	7,325	5,216	773	848	5,813	7,267	6,667
FR CHERRIES(MAY)	MT										
JAPAN		0	30	12,416	15,549	12,467	0	75	77,224	92,508	77,333
CANADA		255	102	6,160	6,251	6,235	389	154	13,221	13,123	13,376
TAIWAN		5	7	2,033	3,002	2,140	11	10	4,557	8,129	4,705
EU		86	162	1,891	3,398	1,942	375	278	6,893	9,623	7,073
HONG KONG		0	0	1,816	1,377	1,847	0	0	5,494	3,668	5,550
OTHER		39	15	758	846	794	87	30	2,580	3,247	2,659
Subtotal:-----		384	316	25,074	30,422	25,424	863	546	109,969	130,298	110,696
PEACH-NECTRN(MAY)	MT										
CANADA		9,532	8,375	41,171	42,907	48,374	7,355	6,034	38,900	35,299	45,185
MEXICO		2,211	5,374	3,094	7,550	6,214	969	1,645	1,541	2,307	3,374
TAIWAN		1,417	5,923	3,437	11,006	4,207	1,469	6,469	3,471	12,005	4,276
OTHER		1,277	1,931	3,300	4,940	4,485	1,087	1,520	3,122	3,831	3,935
Subtotal:-----		14,437	21,603	50,989	66,402	63,265	10,880	15,667	47,009	53,442	56,746
PLUM-PRUNES(MAY)	MT										
CANADA		6,031	5,865	18,373	20,758	23,302	4,927	3,674	19,242	15,753	23,412
TAIWAN		4,602	13,619	11,292	21,212	13,733	3,921	11,959	10,058	18,502	12,198
HONG KONG		2,969	3,212	7,223	6,971	7,995	2,519	2,663	6,188	5,626	6,825
MEXICO		1,023	701	1,099	2,040	3,003	596	344	638	1,154	1,924
OTHER		1,297	2,684	3,801	4,802	6,660	1,087	2,013	3,744	3,887	5,875
Subtotal:-----		15,922	26,080	41,788	55,783	54,692	13,049	20,653	39,869	44,922	50,234
FR AVOCADOS(OCT)	MT										
EU		81	1,645	5,255	3,358	5,269	132	1,576	5,615	3,310	5,644
CANADA		664	182	4,673	1,928	5,165	535	198	3,976	2,594	4,492
JAPAN		207	71	3,163	1,929	3,234	212	142	3,301	3,731	3,387
FRANCE		20	972	2,829	1,606	2,832	27	942	2,725	1,554	2,734
UNITED KINGDOM		36	159	1,850	691	1,854	59	147	2,083	715	2,086
OTHER		19	83	502	297	517	25	64	682	392	701
Subtotal:-----		971	1,981	13,593	7,512	14,186	903	1,979	13,573	10,027	14,224
FR KIWIFRUIT(OCT)	MT										
TAIWAN		0	0	3,554	1,990	3,554	0	0	5,702	3,556	5,702
CANADA		30	59	3,327	3,685	3,387	49	75	4,213	4,535	4,298
KOREA, REPUBLIC		3	0	536	1,729	538	11	0	792	3,120	798
OTHER		0	4	880	1,300	880	0	3	1,274	1,809	1,274
Subtotal:-----		34	63	8,297	8,704	8,359	60	79	11,980	13,021	12,071
FRESH GRAPES (MAY)	MT										
CANADA		12,945	12,505	34,165	33,320	111,233	16,090	13,654	46,339	43,919	123,408
HONG KONG		4,330	4,411	5,455	5,428	18,018	5,120	4,959	6,445	6,315	20,938
TAIWAN		2,423	4,341	2,523	4,567	13,330	3,345	6,309	3,464	6,701	17,239
MEXICO		331	2,721	413	3,004	10,757	283	2,310	356	2,505	9,922
OTHER		5,638	5,926	13,041	12,272	53,162	7,550	7,566	19,314	16,219	67,575
Subtotal:-----		25,668	29,903	55,596	58,591	206,500	32,388	34,798	75,919	75,659	239,081
FR STRAWBRIS(JAN)	MT										
CANADA		2,984	3,060	30,756	34,359	35,611	3,688	3,867	41,354	44,939	49,034
JAPAN		670	718	1,758	2,076	3,967	3,558	3,470	8,512	9,104	20,768
MEXICO		926	1,483	2,075	4,263	3,583	400	1,550	1,057	3,732	1,722
EU		349	1,492	1,431	3,381	2,319	682	3,037	2,967	7,213	4,977
OTHER		60	202	647	1,215	813	228	497	2,114	4,007	2,745
Subtotal:-----		4,988	6,954	36,667	45,294	46,293	8,555	12,421	56,004	68,994	79,245
FR ORNG INC TMPL(NOV)	MT										
CANADA		6,572	6,426	197,447	172,435	206,881	3,624	2,889	94,385	85,821	100,853
JAPAN		18,732	7,652	151,626	144,989	161,786	10,842	4,989	78,989	86,804	87,734
HONG KONG		9,112	10,880	112,542	101,825	128,569	4,256	5,146	53,007	51,831	61,277
OTHER		2,636	3,851	56,696	71,465	59,112	1,312	2,021	28,119	36,883	29,713
Subtotal:-----		37,051	28,809	518,310	490,715	556,348	20,034	15,045	254,500	261,338	279,578
FR GRPFRT(SEP)	MT										
JAPAN		5,233	9,382	222,775	250,229	222,775	2,525	4,640	108,744	130,749	108,744
EU		26	34	116,865	100,931	116,865	41	19	61,288	49,836	61,288
CANADA		2,448	2,340	69,444	74,378	69,444	1,429	1,084	34,612	30,483	34,612
FRANCE		8	0	51,050	39,454	51,050	16	0	25,344	20,546	25,344
NETHERLANDS		0	0	29,021	26,469	29,021	0	0	14,005	12,834	14,005
OTHER		650	1,824	31,919	33,171	31,919	292	816	15,609	16,010	15,609
Subtotal:-----		8,357	13,580	441,003	458,709	441,003	4,286	6,559	220,253	227,078	220,253
FR TANGERINES(NOV)	MT										
CANADA		0	0	8,309	10,081	8,616	0	0	7,247	7,911	7,582
EU		0	0	648	967	648	0	0	506	512	506
OTHER		0	0	180	514	180	0	0	254	497	254
Subtotal:-----		0	0	9,137	11,561	9,444	0	0	8,008	8,920	8,342

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
AUG 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		233	295	1,322	1,106	5,674	239	312	1,512	1,320	6,363
CANADA		208	189	676	757	2,809	249	216	749	838	3,285
HONG KONG		258	59	546	337	1,768	231	68	503	279	1,515
TAIWAN		173	195	708	470	1,719	110	157	620	401	1,493
MEXICO		171	89	288	246	1,400	120	66	215	184	1,061
SINGAPORE		119	37	254	247	1,194	117	50	265	290	1,222
OTHER		207	321	1,102	1,138	4,744	206	279	947	1,074	3,866
Subtotal:-----		1,369	1,185	4,897	4,301	19,309	1,272	1,148	4,810	4,386	18,804
CND PEARS(JUN)	MT										
CANADA		81	59	274	430	1,554	80	51	300	426	1,595
JAPAN		0	42	45	78	402	0	46	62	93	425
MEXICO		60	9	82	14	164	49	8	83	11	144
OTHER		61	22	136	111	770	63	25	118	116	666
Subtotal:-----		202	132	536	632	2,890	192	130	563	647	2,830
CND PNEAPL(JAN)	MT										
JAPAN		218	68	795	684	1,371	198	41	757	647	1,300
CANADA		67	162	950	679	1,354	69	152	940	626	1,306
MEXICO		50	68	363	317	786	44	46	301	222	643
EU		20	197	317	417	533	17	165	288	352	476
GERMANY		0	0	179	219	245	0	0	165	187	224
OTHER		28	24	280	228	373	29	13	185	219	253
Subtotal:-----		383	519	2,705	2,325	4,417	356	418	2,472	2,066	3,977
FRT MIXTURES(JUN)	MT										
JAPAN		931	200	2,269	1,260	6,205	1,146	241	2,547	1,499	7,448
CANADA		491	412	1,520	1,171	5,677	641	462	2,042	1,464	7,055
HONG KONG		358	317	995	1,271	3,999	374	346	1,012	1,367	4,205
SINGAPORE		447	88	734	1,142	2,575	502	81	787	1,179	2,836
OTHER		961	797	2,271	2,104	9,517	1,136	932	2,794	2,416	11,359
Subtotal:-----		3,187	1,814	7,789	6,948	27,974	3,798	2,061	9,182	7,925	32,904
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EU		6,732	5,544	6,732	5,544	51,505	10,672	8,159	10,672	8,159	78,353
UNITED KINGDOM		3,489	3,718	3,489	3,718	26,123	6,051	5,250	6,051	5,250	40,217
JAPAN		2,227	2,073	2,227	2,073	25,338	3,290	2,545	3,290	2,545	37,283
GERMANY		1,689	701	1,689	701	12,132	2,426	1,202	2,426	1,202	16,772
CANADA		1,186	1,353	1,186	1,353	11,595	2,627	3,133	2,627	3,133	24,081
OTHER		3,219	3,553	3,219	3,553	36,667	5,059	6,774	5,059	6,774	59,064
Subtotal:-----		13,364	12,523	13,364	12,523	125,105	21,648	20,611	21,648	20,611	198,782
DRD PRUNES(AUG)	MT										
EU		3,444	2,143	3,444	2,143	27,649	7,260	4,946	7,260	4,946	65,513
JAPAN		879	1,038	879	1,038	14,216	1,847	2,151	1,847	2,151	32,752
GERMANY		1,108	1,005	1,108	1,005	10,952	2,448	2,222	2,448	2,222	25,806
ITALY		844	398	844	398	6,245	2,074	1,131	2,074	1,131	16,900
CANADA		566	369	566	369	4,683	1,152	867	1,152	867	11,106
NETHERLANDS		600	224	600	224	3,798	1,338	647	1,338	647	10,261
OTHER		1,780	1,194	1,780	1,194	13,955	3,618	3,476	3,618	3,476	30,579
Subtotal:-----		6,669	4,744	6,669	4,744	60,503	13,878	11,439	13,878	11,439	139,950
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU		10,806	7,377	88,061	72,452	107,753	4,203	3,471	33,365	28,728	42,269
CANADA		10,414	3,417	87,212	25,309	99,111	4,717	4,455	39,078	38,962	46,741
FRANCE		3,241	2,493	33,473	33,977	42,560	1,344	789	14,346	12,162	18,467
JAPAN		4,239	16,125	33,247	66,450	37,807	1,662	3,540	13,257	26,065	15,138
KOREA, REPUBLIC		6,537	1,115	24,876	19,240	30,421	2,671	1,495	10,298	12,603	13,872
NETHERLANDS		2,050	340	18,496	16,646	19,427	515	161	4,473	6,825	4,744
OTHER		6,609	4,822	47,955	37,150	64,198	2,356	1,991	16,408	15,189	22,064
Subtotal:-----		38,604	32,856	281,350	220,601	339,290	15,610	14,952	112,407	121,548	140,085
ORNG JU NTCNC(DEC)	KL										
CANADA		3,964	5,598	33,651	47,539	47,869	2,772	3,528	25,201	30,874	34,699
EU		1,743	6,736	19,463	37,074	23,888	1,189	4,145	12,812	23,061	15,598
FRANCE		221	0	7,379	2,814	8,423	134	0	5,042	1,759	5,770
BELGIUM-LUXEMBOU		546	5,446	5,642	21,354	6,262	390	3,416	3,858	13,449	4,278
UNITED KINGDOM		399	1,147	3,891	9,810	5,108	244	636	2,334	5,691	3,071
SWEDEN		378	239	3,601	1,829	4,763	421	273	3,911	1,623	5,257
OTHER		921	2,393	12,272	16,014	16,194	822	1,896	9,581	12,101	12,453
Subtotal:-----		7,006	14,966	68,988	102,456	92,714	5,204	9,842	51,505	67,659	68,006
GRPFRT JU CNC (DEC)	KL										
JAPAN		1,792	1,088	25,178	14,032	28,127	997	1,278	16,931	17,307	19,417
EU		1,182	905	17,623	12,244	20,014	606	728	8,078	5,647	9,297
NETHERLANDS		339	172	7,143	3,105	7,935	152	179	3,442	1,989	3,861
CANADA		278	379	6,167	2,198	7,066	200	669	4,440	3,632	5,268
FRANCE		144	309	3,024	5,755	4,002	72	129	1,332	1,691	1,807
UNITED KINGDOM		54	213	3,660	1,643	3,785	30	325	1,289	872	1,353
OTHER		264	504	1,890	3,125	2,390	179	198	1,114	1,706	1,376
Subtotal:-----		3,516	2,875	50,857	31,599	57,597	1,982	2,873	30,564	28,292	35,358
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
CANADA		138	82	9,759	7,232	9,868	347	250	21,296	16,937	21,592
JAPAN		232	351	7,396	10,117	7,498	1,402	2,259	28,981	39,817	29,584
EU		30	37	1,858	1,662	1,866	100	120	5,482	4,461	5,507
SWITZERLAND		1	0	1,793	2,363	1,794	3	0	4,980	7,628	4,985
OTHER		3	43	262	354	264	12	181	843	1,479	846
Subtotal:-----		404	513	21,067	21,728	21,289	1,864	2,809	61,582	70,321	62,514
FR ONIONS(OCT)	MT										
CANADA		8,713	7,583	111,568	97,282	117,151	2,917	2,161	46,136	38,209	47,955
JAPAN		17,695	5,685	20,498	23,953	28,107	5,613	1,668	6,387	7,416	9,044
MEXICO		224	4,528	17,807	14,215	21,278	81	1,261	5,734	4,153	6,759
OTHER		2,218	6,845	12,926	23,285	16,469	865	2,317	6,657	10,239	8,083
Subtotal:-----		28,850	24,641	162,799	158,735	183,006	9,476	7,407	64,914	60,017	71,841
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
JAPAN		3,156	2,672	3,156	2,672	59,668	2,550	2,255	2,550	2,255	48,168
EU		4,727	1,993	4,727	1,993	36,828	3,221	1,312	3,221	1,312	26,381
TAIWAN		1,511	1,383	1,511	1,383	15,911	1,188	1,313	1,188	1,313	14,379
HONG KONG		1,013	576	1,013	576	13,803	792	495	792	495	10,733
UNITED KINGDOM		1,271	288	1,271	288	11,526	907	210	907	210	8,145
NETHERLANDS		1,598	1,052	1,598	1,052	11,266	921	614	921	614	7,928
OTHER		1,480	2,041	1,480	2,041	28,267	1,241	1,682	1,241	1,682	23,709
Subtotal:-----		11,887	8,665	11,887	8,665	154,477	8,992	7,057	8,992	7,057	123,369

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
AUG 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CANNED VEGETABLES											
CND TOM PAS(JUL)	MT										
CANADA		5,624	7,223	8,273	11,045	43,168	5,354	5,954	7,672	9,162	37,437
JAPAN		1,395	702	1,514	1,002	8,247	918	538	1,020	751	6,858
AUSTRALIA		1,731	0	1,980	0	6,332	1,268	0	1,459	0	4,893
KOREA, REPUBLIC		139	121	231	183	4,800	100	122	172	176	4,343
OTHER		526	1,701	902	2,363	15,267	433	1,392	843	1,922	11,682
Subtotal:-----		9,416	9,748	12,900	14,594	77,814	8,073	8,007	11,166	12,011	65,213
CND TOM SAUCE(JUL)	MT										
CANADA		2,829	3,167	7,994	5,849	51,739	2,975	3,281	7,918	5,928	51,151
EU		147	573	233	2,189	6,737	269	507	390	2,012	7,234
MEXICO		437	707	907	1,555	6,060	279	503	582	1,053	3,953
JAPAN		329	440	882	731	5,201	277	489	836	811	6,127
UNITED KINGDOM		27	57	43	1,486	4,764	32	69	57	1,361	4,723
OTHER		776	651	1,261	1,537	10,975	747	751	1,241	1,511	10,758
Subtotal:-----		4,518	5,537	11,277	11,861	80,713	4,547	5,531	10,968	11,315	79,222
FZN SWT CORN(JUL)	MT										
JAPAN		3,275	2,414	5,972	4,639	39,969	2,785	2,125	5,132	4,397	36,158
AUSTRALIA		337	49	1,950	237	5,189	272	48	1,248	172	3,921
HONG KONG		341	128	639	448	4,235	262	122	427	453	3,345
CANADA		112	444	166	847	3,124	78	327	112	650	2,543
OTHER		773	1,595	1,278	3,209	9,873	622	1,276	1,036	2,175	8,317
Subtotal:-----		4,837	4,629	10,006	9,379	62,389	4,019	3,899	7,956	7,848	54,283
FZN F FRY(JUL)	MT										
JAPAN		10,823	12,141	22,088	24,779	134,450	7,541	8,709	15,473	17,846	95,428
KOREA, REPUBLIC		1,523	1,079	2,626	2,297	17,784	996	761	1,697	1,601	11,869
HONG KONG		1,057	1,171	1,997	2,388	12,812	687	811	1,327	1,610	8,402
OTHER		5,849	6,705	12,453	14,003	75,482	4,222	5,040	8,900	10,520	56,337
Subtotal:-----		19,251	21,096	39,164	43,467	240,529	13,446	15,322	27,397	31,577	172,036
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
JAPAN		145	383	301	584	6,276	333	1,156	619	1,643	15,711
INDIA		934	353	1,300	885	4,259	2,606	969	3,460	2,766	12,553
EU		76	903	76	945	836	162	1,932	162	2,034	1,567
OTHER		82	126	134	197	2,074	174	281	295	481	4,996
Subtotal:-----		1,237	1,766	1,811	2,612	13,445	3,274	4,338	4,537	6,925	34,827
ALMND SH/PREP(JUL)	MT										
EU		9,737	7,058	14,132	12,071	91,561	36,246	29,122	52,250	50,883	403,672
GERMANY		5,035	3,646	7,020	5,499	39,872	18,308	15,109	25,420	22,699	169,362
JAPAN		1,894	962	2,763	1,852	18,588	7,318	5,118	10,756	10,165	96,366
UNITED KINGDOM		1,185	693	1,868	1,035	11,946	4,146	2,779	6,737	4,471	50,821
NETHERLANDS		1,279	659	1,627	1,153	11,169	5,233	2,446	6,504	4,844	52,747
FRANCE		990	315	1,400	1,098	10,868	3,854	1,149	5,487	4,327	51,248
OTHER		3,286	2,938	6,292	6,287	52,499	11,903	10,836	22,437	22,933	217,100
Subtotal:-----		14,917	10,958	23,187	20,209	162,648	55,466	45,076	85,443	83,981	717,138
WALNUTS SH(AUG)	MT										
EU		241	210	241	210	7,168	551	472	551	472	15,703
JAPAN		126	318	126	318	4,911	686	1,644	686	1,644	26,606
ITALY		0	0	0	0	2,252	0	0	0	0	4,117
CANADA		64	190	64	190	2,120	231	593	231	593	6,996
FRANCE		0	6	0	6	1,417	0	21	0	21	2,616
ISRAEL		0	86	0	86	1,399	0	313	0	313	6,259
OTHER		108	202	108	202	3,741	226	663	226	663	14,458
Subtotal:-----		539	1,006	539	1,006	19,339	1,693	3,685	1,693	3,685	70,023
WALNUTS UNSH(AUG)	MT										
EU		34	83	34	83	36,499	82	142	82	142	69,146
SPAIN		0	0	0	0	9,746	0	0	0	0	18,400
NETHERLANDS		0	0	0	0	8,600	0	0	0	0	16,459
GERMANY		0	20	0	20	8,593	0	34	0	34	16,217
ITALY		0	0	0	0	5,908	0	0	0	0	11,358
OTHER		313	348	313	348	7,737	678	641	678	641	16,150
Subtotal:-----		348	431	348	431	44,236	760	783	760	783	85,296
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		0	24	1,369	1,219	1,369	0	99	6,191	5,852	6,191
CANADA		81	120	1,041	1,267	1,041	666	802	7,124	8,310	7,124
EU		32	0	724	504	724	216	0	4,588	2,988	4,588
MEXICO		0	0	483	363	483	0	0	3,291	2,593	3,291
COLOMBIA		0	0	443	54	443	0	0	3,510	322	3,510
GERMANY		0	0	335	154	335	0	0	1,819	724	1,819
OTHER		24	3	1,053	819	1,053	148	20	5,984	3,494	5,984
Subtotal:-----		137	146	5,113	4,224	5,113	1,031	920	30,688	23,559	30,688
HOP EXTRACT(SEP)	MT										
EU		86	64	1,458	1,290	1,458	1,301	1,192	24,964	18,945	24,964
GERMANY		23	39	710	459	710	143	629	11,849	6,085	11,849
MEXICO		0	16	706	2,246	706	0	187	12,127	15,676	12,127
BRAZIL		0	33	402	533	402	0	416	3,040	4,742	3,040
NETHERLANDS		41	8	278	330	278	871	225	5,119	5,995	5,119
KOREA, REPUBLIC		26	0	258	155	258	265	0	2,668	2,705	2,668
OTHER		50	48	1,081	1,238	1,081	954	566	22,356	21,073	22,356
Subtotal:-----		163	159	3,905	5,460	3,905	2,520	2,362	65,154	63,141	65,154
HOPS,NSPF(SEP)	MT										
EU		0	0	2,073	1,106	2,073	0	0	10,842	4,874	10,842
GERMANY		0	0	1,662	829	1,662	0	0	8,379	3,291	8,379
UNITED KINGDOM		0	0	305	269	305	0	0	1,856	1,472	1,856
JAPAN		0	0	206	233	206	0	0	1,149	1,424	1,149
OTHER		11	91	333	662	333	133	508	4,091	5,259	4,091
Subtotal:-----		11	91	2,612	2,000	2,612	133	508	16,082	11,557	16,082
WINE											
GRAPE WINE(JAN)	KL										
EU		4,807	4,082	33,363	24,072	45,115	7,106	7,008	48,091	41,504	66,545
CANADA		2,543	3,832	22,023	22,717	32,584	3,796	5,287	28,901	31,072	45,078
UNITED KINGDOM		2,497	2,820	16,959	13,222	24,121	4,148	5,105	27,572	24,721	38,803
JAPAN		886	1,236	7,721	8,942	12,347	1,086	1,836	11,061	13,384	17,774
DENMARK		632	201	5,370	2,141	6,559	574	173	5,183	2,034	6,312
OTHER		1,492	3,163	15,590	24,707	26,903	2,214	3,696	21,077	31,295	36,079
Subtotal:-----		9,728	12,314	78,697	80,438	116,948	14,202	17,827	109,129	117,256	165,476

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
AUG 94

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY: CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS): CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		122	738	2,172	4,478	28,387	160	946	2,506	6,293	31,041
SOUTH AFRICA, RE		2,042	1,784	3,781	5,508	19,044	1,598	1,484	2,956	4,544	16,039
CANADA		1,423	898	3,686	1,311	29,886	604	601	1,302	788	13,666
OTHER		1,468	4	6,184	186	33,758	757	4	2,757	103	13,616
Subtotal:-----		5,056	3,424	15,823	11,483	111,075	3,119	3,036	9,522	11,728	74,362
FR PEARS(JUL)	MT										
CHILE		0	0	143	56	44,495	0	0	43	20	16,093
ARGENTINA		0	0	0	0	13,831	0	0	0	0	7,587
OTHER		0	0	0	0	7,183	0	0	0	0	9,888
Subtotal:-----		0	0	143	56	65,509	0	0	43	20	33,569
APRICOT (MAY)	MT										
CHILE		0	0	0	0	781	0	0	0	0	489
NEW ZEALAND		0	0	0	0	157	0	0	0	0	283
TURKEY		0	0	0	0	56	0	0	0	0	159
OTHER		0	1	46	2	47	0	2	59	3	62
Subtotal:-----		0	1	46	2	1,042	0	2	59	3	993
PEACH-NEC(MAY)	MT										
CHILE		0	0	0	0	42,893	0	0	0	0	27,605
OTHER		101	98	115	107	252	93	82	110	94	240
Subtotal:-----		101	98	115	107	43,145	93	82	110	94	27,844
PLUM-PRUNE(MAY)	MT										
CHILE		0	0	10	99	21,389	0	0	13	60	14,143
OTHER		18	16	58	51	233	19	30	54	85	215
Subtotal:-----		18	16	68	150	21,621	19	30	67	145	14,358
FRESH GRAPES (MAY)	MT										
CHILE		0	31	2,089	4,201	265,879	0	16	1,583	3,305	201,749
MEXICO		0	3	41,305	41,037	41,331	0	4	55,211	46,560	55,237
OTHER		1	0	1	0	1,566	2	0	2	0	1,482
Subtotal:-----		1	35	43,394	45,237	308,775	2	20	56,796	49,865	258,468
FR RASPBRY(JAN)	MT										
CANADA		210	262	5,072	6,157	5,122	364	542	9,171	13,026	9,292
OTHER		6	0	518	799	774	16	0	797	1,408	1,484
Subtotal:-----		216	262	5,589	6,956	5,896	380	542	9,967	14,434	10,776
FR STRAWBRIS(JAN)	MT										
MEXICO		0	0	11,875	17,877	12,747	0	0	16,683	30,428	17,985
OTHER		1	3	273	142	1,480	2	12	505	315	3,491
Subtotal:-----		1	3	12,148	18,019	14,227	2	12	17,187	30,743	21,476
FR BANANA(JAN)	MT										
COSTA RICA		92,037	89,741	630,473	620,446	922,519	26,283	21,617	189,534	155,915	272,504
ECUADOR		64,011	69,863	529,438	534,592	761,367	17,588	17,755	146,466	138,633	205,877
COLOMBIA		56,987	56,228	368,014	414,428	596,321	15,335	16,866	103,939	123,408	166,146
OTHER		116,899	112,722	821,979	892,739	1,232,936	29,749	30,285	238,082	249,029	350,376
Subtotal:-----		329,935	328,554	2,349,904	2,462,204	3,513,144	88,956	86,523	678,021	666,985	994,903
FR MANGO(JAN)	MT										
MEXICO		10,440	18,171	91,541	102,186	94,439	7,055	12,122	69,622	76,776	71,626
OTHER		96	47	12,892	9,796	16,518	179	184	10,317	8,584	15,619
Subtotal:-----		10,536	18,218	104,434	111,982	110,957	7,235	12,305	79,939	85,360	87,245
FR PINAPLE(JAN)	MT										
COSTA RICA		7,235	7,526	50,252	55,482	72,226	3,029	2,528	22,035	19,772	30,880
HONDURAS		1,726	1,429	17,766	21,133	26,273	582	393	5,045	5,818	7,482
OTHER		2,110	1,703	19,736	13,034	25,896	682	303	5,213	2,805	6,986
Subtotal:-----		11,071	10,658	87,754	89,650	124,395	4,294	3,224	32,293	28,395	45,348
FR CANTLPE(MAY)	MT										
COSTA RICA		0	0	3,288	5,738	43,061	0	0	1,961	2,179	18,971
MEXICO		12	0	19,591	16,748	63,603	2	0	5,004	5,358	17,851
HONDURAS		0	0	4,316	2,782	64,399	0	0	1,074	616	14,716
GUATEMALA		0	0	2,649	2,300	36,328	0	0	858	934	11,415
OTHER		5	0	411	302	19,831	2	0	133	67	4,630
Subtotal:-----		16	0	30,255	27,870	227,221	4	0	9,030	9,154	67,583
FR MELON,OT(MAY)	MT										
MEXICO		17	0	12,842	13,252	40,290	3	0	3,851	4,653	14,546
COSTA RICA		0	0	871	1,014	29,573	0	0	314	392	11,703
OTHER		0	17	1,603	1,753	44,425	0	7	564	517	14,557
Subtotal:-----		17	17	15,316	16,019	114,288	3	7	4,729	5,562	40,806
FR ORANGES(NOV)	MT										
AUSTRALIA		3,392	6,859	3,394	9,382	4,556	4,664	7,774	4,669	10,635	6,267
OTHER		481	595	5,208	6,125	5,795	135	173	1,837	2,434	2,007
Subtotal:-----		3,873	7,454	8,602	15,510	10,350	4,800	7,946	6,505	13,084	8,274
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU		1,565	2,233	15,897	23,870	19,589	1,482	1,797	15,236	18,442	18,494
SPAIN		1,547	2,233	15,878	23,735	19,569	1,466	1,797	15,219	18,318	18,474
CHINA, PEOPLES R		2,036	1,885	12,579	12,178	19,713	1,763	1,372	10,669	9,159	16,285
OTHER		0	122	869	644	988	0	125	1,058	581	1,163
Subtotal:-----		3,602	4,240	29,345	36,693	40,290	3,245	3,294	26,963	28,182	35,942
CND BLK OLV(NOV)	MT										
EU		1,200	935	10,432	10,873	12,275	2,344	1,949	21,557	21,164	24,927
SPAIN		1,009	803	8,730	9,104	10,260	1,839	1,616	17,220	17,102	19,913
MOROCCO		330	600	2,437	2,541	2,661	570	1,071	4,355	4,520	4,733
OTHER		2	1	117	103	125	3	5	216	187	236
Subtotal:-----		1,532	1,535	12,985	13,516	15,061	2,916	3,024	26,128	25,871	29,896
CND GRN OLV(NOV)	MT										
EU		3,394	3,422	33,610	33,629	41,192	8,286	9,355	85,694	87,100	104,739
SPAIN		3,274	3,379	32,764	33,041	40,160	7,982	9,252	84,011	85,917	102,781
OTHER		172	353	1,805	2,147	2,058	315	587	2,909	3,180	3,331
Subtotal:-----		3,565	3,775	35,415	35,776	43,249	8,601	9,942	88,603	90,280	108,070
CND PEACH(JUN)	MT										
EU		1,184	1,179	3,160	3,316	16,731	712	657	1,884	1,889	9,614
GREECE		1,179	1,173	3,109	3,250	15,515	700	642	1,831	1,817	8,832
OTHER		98	207	376	1,383	4,479	52	125	226	879	2,310
Subtotal:-----		1,281	1,385	3,536	4,699	21,211	764	782	2,110	2,769	11,925
CND PINAPLE(JAN)	MT										
THAILAND		15,062	15,166	128,242	109,606	172,014	8,269	7,674	79,702	56,294	101,834
PHILIPPINES		13,655	14,717	86,222	93,936	128,465	9,464	7,298	60,011	57,024	88,280
OTHER		2,917	4,115	29,634	29,730	41,758	1,405	1,976	12,008	11,828	16,877
Subtotal:-----		31,634	33,998	244,098	233,272	342,237	19,138	16,948	151,722	125,147	206,991
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		687	617	996	707	8,765	1,656	1,019	2,348	1,180	22,058
OTHER		1	37	4	41	556	2	114	16	122	1,434
Subtotal:-----		688	654	999	749	9,321	1,658	1,133	2,364	1,302	23,491

U.S. IMPORTS OF SELECTEO HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INOICATEO
AUG 94

COMMOOITY ANO COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TOT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TOT LAST YR	VALUE YR TOT CURR YR	VALUE LAST YEAR
DATES(SEP)	MT										
PAKISTAN		89	254	3,720	4,346	3,720	96	192	4,036	4,288	4,036
CHINA, PEOPLES R		6	23	1,090	484	1,090	6	37	1,152	667	1,152
OTHER		33	30	689	500	689	47	28	1,330	879	1,330
Subtotal:-----		127	307	5,498	5,330	5,498	149	258	6,518	5,835	6,518
DRD FIG(SEP)	MT										
EU		0	0	969	761	969	0	0	2,403	1,820	2,403
GREECE		0	0	943	727	943	0	0	2,301	1,695	2,301
TURKEY		270	0	1,240	1,329	1,240	208	0	1,300	1,854	1,300
OTHER		202	190	562	1,455	562	86	685	266	1,301	266
Subtotal:-----		472	190	2,771	3,545	2,771	294	685	3,969	4,975	3,969
DRD RAISIN(AUG)	MT										
MEXICO		517	238	517	238	3,413	444	194	444	194	3,151
TURKEY		166	219	166	219	2,151	156	191	156	191	2,187
CHILE		235	225	235	225	1,015	290	257	290	257	1,271
OTHER		23	75	23	75	376	37	94	37	94	403
Subtotal:-----		941	758	941	758	6,955	927	736	927	736	7,012
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
ARGENTINA		49,442	58,804	96,579	92,430	381,558	9,503	8,943	18,298	13,997	65,091
EU		11,359	15,277	33,568	41,373	268,292	2,521	3,009	7,521	7,468	56,543
GERMANY		9,012	9,996	23,357	32,574	206,835	1,908	2,131	5,340	5,921	44,842
OTHER		64,798	31,018	113,238	57,191	498,195	14,077	4,382	24,853	8,931	99,159
Subtotal:-----		125,599	105,099	243,385	190,995	1,148,045	26,101	16,335	50,672	30,396	220,793
FCOJ(DEC)	KL										
BRAZIL		115,072	78,974	616,374	881,949	1,089,726	23,135	14,108	94,244	165,784	190,381
OTHER		13,258	15,544	103,734	186,526	137,517	2,746	3,834	19,224	44,667	25,686
Subtotal:-----		128,330	94,518	720,108	1,068,475	1,227,243	25,880	17,942	113,468	210,451	216,066
GRAPE JU(JAN)	KL										
SWEDEN		4,476	0	50,989	0	51,169	1,083	0	15,982	0	16,067
EU		3,947	1,327	9,785	21,323	24,178	1,198	777	4,526	11,422	8,460
OTHER		4,967	5,969	37,594	27,803	54,769	1,679	1,713	13,996	8,885	19,669
Subtotal:-----		13,389	7,295	98,368	49,126	130,116	3,960	2,490	34,504	20,307	44,196
PNEAPL JUCN(JAN)	KL										
THAILANO		13,932	5,442	123,191	73,602	156,558	2,517	770	24,773	11,648	30,322
PHILIPPINES		10,040	9,491	75,878	65,014	113,215	2,020	1,287	16,109	11,210	23,255
OTHER		2,313	1,953	18,324	16,076	24,227	566	511	5,068	3,876	6,782
Subtotal:-----		26,285	16,885	217,393	154,692	294,000	5,102	2,569	45,950	26,734	60,359
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		5,619	2,915	20,058	31,950	29,454	2,084	651	7,451	9,289	10,933
OTHER		113	735	10,372	13,651	13,450	35	569	2,477	7,264	4,309
Subtotal:-----		5,732	3,650	30,430	45,601	42,904	2,119	1,220	9,928	16,553	15,242
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		441	181	17,817	17,534	18,446	396	160	16,756	16,695	17,277
OTHER		81	82	923	742	1,274	231	276	3,122	1,954	3,826
Subtotal:-----		522	263	18,740	18,276	19,720	626	436	19,878	18,649	21,103
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		6	7	11,417	9,773	11,424	9	21	14,208	12,992	14,214
OTHER		290	307	613	787	729	271	237	674	616	783
Subtotal:-----		296	314	12,030	10,559	12,152	280	257	14,882	13,608	14,998
FR CARROT(OCT)	MT										
CANAOA		2,877	3,571	33,521	40,135	39,943	765	1,246	8,825	10,132	10,429
MEXICO		340	104	10,259	11,415	10,923	102	30	3,102	2,918	3,267
OTHER		0	0	546	373	566	0	0	357	256	370
Subtotal:-----		3,217	3,674	44,326	51,923	51,432	867	1,276	12,284	13,306	14,067
FR CABBAGE(OCT)	MT										
CANAOA		1,700	1,670	15,562	10,063	17,625	553	435	3,864	2,460	4,420
MEXICO		464	417	7,648	5,030	8,318	66	118	1,448	879	1,542
OTHER		27	0	832	190	871	12	0	535	86	565
Subtotal:-----		2,192	2,088	24,041	15,283	26,815	631	553	5,847	3,425	6,526
FR CELERY(OCT)	MT										
MEXICO		0	0	11,581	8,191	11,581	0	0	4,719	2,237	4,719
CANADA		1,433	1,876	2,087	2,448	4,643	400	560	554	767	1,340
OTHER		0	0	562	60	600	0	0	109	24	117
Subtotal:-----		1,433	1,876	14,228	10,700	16,823	400	560	5,382	3,028	6,176
FR CUCMBR(OCT	MT										
MEXICO		2,338	4,683	212,830	228,704	213,505	924	1,960	76,252	98,409	76,639
OTHER		613	955	24,866	19,499	25,337	530	672	8,099	6,939	8,554
Subtotal:-----		2,951	5,638	237,696	248,202	238,842	1,453	2,632	84,351	105,348	85,192
FR CAULFLWR(OCT)	MT										
CANADA		788	961	1,399	2,199	3,018	253	337	460	753	998
MEXICO		0	20	666	1,662	666	0	3	319	487	319
OTHER		18	0	192	0	192	14	0	133	0	133
Subtotal:-----		806	980	2,257	3,861	3,876	267	340	911	1,240	1,449
FR GARLIC(OCT)	MT										
MEXICO		70	34	10,463	10,272	10,500	138	123	10,933	10,327	11,055
CHINA, PEOPLES R		6,734	146	9,051	16,084	14,338	3,180	37	4,936	8,869	7,236
OTHER		432	215	4,111	4,251	4,333	266	208	4,754	5,104	4,854
Subtotal:-----		7,236	395	23,626	30,607	29,172	3,584	368	20,623	24,300	23,145
FR ONION(OCT)	MT										
MEXICO		4,183	3,534	188,972	177,429	192,287	3,187	2,870	91,134	105,744	93,837
OTHER		2,246	2,131	18,355	64,412	24,451	1,146	1,057	8,225	24,389	10,015
Subtotal:-----		6,429	5,665	207,326	241,840	216,739	4,333	3,927	99,359	130,132	103,853
FR PEPPERS(OCT)	MT										
MEXICO		3,746	2,770	134,837	141,226	138,708	2,988	2,313	131,412	135,443	134,106
EU		2,080	2,434	14,404	16,016	16,090	2,793	4,540	33,877	38,507	37,118
NETHERLANDS		2,013	2,398	13,988	15,600	15,624	2,693	4,456	32,831	37,285	35,960
OTHER		607	762	2,849	3,213	3,994	832	1,003	5,600	5,973	6,733
Subtotal:-----		6,433	5,966	152,090	160,456	158,793	6,613	7,857	170,889	179,924	177,957
FR SEED POT(OCT)	MT										
CANAOA		91	0	74,461	106,322	74,524	10	0	11,482	21,730	11,499
OTHER		6	0	104	74	137	4	0	56	41	81
Subtotal:-----		97	0	74,565	106,396	74,661	14	0	11,539	21,771	11,579
FR TBL POT(OCT)	MT										
CANAOA		3,367	5,481	212,729	198,322	227,512	585	1,087	35,274	46,520	38,014
OTHER		0	0	13	59	13	0	0	3	31	3
Subtotal:-----		3,367	5,481	212,742	198,381	227,525	585	1,087	35,277	46,551	38,017
FR TOMATO(OCT)	MT										
MEXICO		14,468	18,878	350,520	371,941	365,168	7,491	14,990	279,937	293,871	289,182
OTHER		1,126	2,292	14,717	19,177	15,744	1,196	3,026	17,001	25,392	18,273
Subtotal:-----		15,595	21,169	365,237	391,119	380,912	8,687	18,015	296,938	319,263	307,454

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
AUG 94

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH VEGETABLES											
FR ASPARG(OCT)	MT										
MEXICO		1,232	1,515	22,299	17,668	22,613	1,170	1,783	31,275	28,468	31,593
OTHER		480	746	5,935	7,631	7,239	475	1,193	6,307	10,057	7,620
Subtotal:-----		1,712	2,260	28,234	25,299	29,852	1,645	2,976	37,582	38,525	39,213
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		0	0	193	605	28,428	0	0	129	425	18,343
CHILE		204	364	279	674	5,786	137	272	197	528	4,827
OTHER		692	521	914	1,046	9,199	452	212	661	535	6,024
Subtotal:-----		896	885	1,385	2,326	43,412	589	483	987	1,488	29,193
CND TOM SAUCE(JUL)	MT										
EU		28	130	47	974	6,956	27	126	46	754	5,984
SPAIN		0	0	0	821	5,574	0	1	0	613	5,152
CANADA		971	102	1,455	245	4,507	537	136	828	246	2,959
OTHER		152	587	310	737	3,926	85	395	269	521	2,659
Subtotal:-----		1,150	820	1,812	1,956	15,390	649	657	1,143	1,521	11,602
CND TOMATO(JUL)	MT										
CHILE		1,310	1,638	2,778	3,190	11,194	618	769	1,365	1,512	5,358
EU		825	2,222	1,509	4,049	16,699	228	677	432	1,442	5,304
ITALY		776	2,171	1,425	3,998	16,403	212	661	402	1,426	5,200
ISRAEL		2,256	1,249	2,256	1,593	11,366	684	414	684	484	3,408
OTHER		751	234	1,283	266	4,426	356	119	635	148	2,215
Subtotal:-----		5,141	5,342	7,827	9,097	43,686	1,885	1,979	3,116	3,586	16,285
CND MSHROOM(JUL)	MT										
CHINA, PEOPLES R		934	1,809	2,325	4,187	18,168	1,645	3,132	4,095	7,084	28,859
INDONESIA		925	1,435	2,136	2,620	10,212	2,155	3,454	4,862	6,338	23,976
HONG KONG		453	656	974	1,412	12,407	756	1,530	1,716	3,291	22,900
OTHER		960	1,849	1,720	3,991	17,366	2,506	4,451	4,567	9,426	42,560
Subtotal:-----		3,272	5,749	7,155	12,209	58,153	7,061	12,568	15,240	26,139	118,295
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		5,917	6,395	159,838	111,894	159,838	3,891	4,080	106,192	75,111	106,192
OTHER		1,987	2,683	15,408	17,183	15,408	1,302	2,022	10,933	11,448	10,933
Subtotal:-----		7,904	9,079	175,246	129,077	175,246	5,193	6,102	117,125	86,559	117,125
FZN CAULFLR(SEP)	MT										
MEXICO		681	733	20,199	26,053	20,199	542	558	14,433	22,679	14,433
OTHER		243	540	1,899	2,946	1,899	131	363	1,249	1,522	1,249
Subtotal:-----		924	1,273	22,097	28,999	22,097	673	921	15,682	24,201	15,682
FZN POTATO(SEP)	MT										
CANADA		8,925	9,778	121,553	128,822	121,553	4,972	5,316	66,834	71,265	66,834
OTHER		55	4	402	258	402	26	14	259	280	259
Subtotal:-----		8,980	9,782	121,956	129,081	121,956	4,999	5,330	67,093	71,545	67,093
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
HONG KONG		0	0	40	81	40	0	0	81	143	81
TURKEY		0	0	7	110	7	0	0	24	304	24
OTHER		0	0	0	0	0	0	0	2	1	2
Subtotal:-----		0	0	47	191	47	0	0	107	448	107
CASHEW NUT(AUG)	MT										
INDIA		2,452	4,730	2,452	4,730	40,026	10,616	21,218	10,616	21,218	170,332
BRAZIL		2,437	1,474	2,437	1,474	19,611	9,678	6,725	9,678	6,725	87,871
OTHER		266	424	266	424	4,804	876	2,009	876	2,009	18,104
Subtotal:-----		5,155	6,627	5,155	6,627	64,440	21,170	29,952	21,170	29,952	276,306
FILBERTS(AUG)	MT										
TURKEY		298	80	298	80	3,360	798	399	798	399	11,711
OTHER		5	4	5	4	196	20	26	20	26	763
Subtotal:-----		303	84	303	84	3,556	817	425	817	425	12,474
PECANS NSH(SEP)	MT										
MEXICO		0	0	12,772	6,667	12,772	0	0	33,861	7,599	33,861
OTHER		0	0	148	327	148	0	0	449	1,081	449
Subtotal:-----		0	0	12,920	6,994	12,920	0	0	34,310	8,680	34,310
WINES											
CHMP&SPRK WN(JAN)	KL										
EU		2,309	2,549	13,018	12,714	30,523	17,509	23,802	116,616	120,129	265,363
FRANCE		714	736	4,654	4,743	10,065	11,215	15,565	82,503	86,237	179,059
ITALY		1,067	1,193	4,411	4,419	11,753	4,588	5,363	19,196	19,387	50,998
OTHER		13	24	172	186	302	48	65	565	568	1,034
Subtotal:-----		2,322	2,573	13,190	12,900	30,825	17,557	23,867	117,181	120,697	266,397
FT&VERM WN(JAN)	KL										
EU		1,210	1,425	7,097	9,177	12,389	4,896	5,530	26,952	35,284	48,713
ITALY		668	780	3,918	5,240	6,954	1,608	1,802	9,443	12,703	16,829
SPAIN		268	449	1,872	2,508	3,278	1,431	2,059	8,297	11,597	14,484
PORTUGAL		91	106	686	871	1,295	914	1,276	6,475	8,813	13,324
OTHER		9	32	101	122	159	44	107	414	499	671
Subtotal:-----		1,219	1,456	7,199	9,299	12,547	4,940	5,637	27,366	35,783	49,384
OTH GP WINE(JAN)	KL										
EU		12,349	14,394	91,512	110,589	152,864	36,916	45,702	343,231	360,991	553,012
FRANCE		3,966	3,710	32,540	34,929	55,169	16,216	17,391	192,824	173,417	303,623
ITALY		6,153	8,709	45,126	60,710	75,390	14,616	21,868	111,044	145,687	186,307
OTHER		3,797	4,712	29,271	30,338	42,637	8,097	10,506	65,028	70,618	97,598
Subtotal:-----		16,146	19,106	120,784	140,926	195,502	45,013	56,208	408,259	431,609	650,610
OTH WN PROD(JAN)	KL										
JAPAN		125	86	1,655	1,069	2,276	487	299	5,042	3,967	7,018
EU		285	411	2,254	3,088	3,709	401	527	3,087	4,097	5,144
CANADA		547	249	1,539	2,743	2,084	783	330	2,334	3,616	2,953
OTHER		140	27	629	630	1,148	200	72	1,178	1,247	2,121
Subtotal:-----		1,097	773	6,077	7,530	9,216	1,871	1,228	11,641	12,927	17,236
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	3,925	4,673	59,416	69,171	80,312
OTHER		0	0	0	0	0	1,341	1,767	19,579	24,577	27,079
Subtotal:-----		0	0	0	0	0	5,266	6,440	78,995	93,748	107,392
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	4,645	4,428	54,864	59,726	82,941
OTHER		0	0	0	0	0	105	113	1,497	1,730	2,143
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